

DDRS Crisis Product

User Guide

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1. The CORM Product

The Crisis / Outreach / Risk Management (CORM) product is a web-based application that provides real-time access to developmentally disabled (DD) consumer information in the Division of Disability and Rehabilitative Services (DDRS) case management system. By using the CORM product, you can deliver Crisis, Outreach, and Risk Management support to consumers on behalf of DDRS.

1.1. How to Use the DDRS Crisis User Guide

The *DDRS Crisis User Guide* is intended to provide information about the user interface, features, and functionality of the Crisis section of the CORM software product. The guide includes [hypertext links](#) that you can use to move to related topics. You can also select a topic heading in the Table of Contents on Page 2 to move to that topic.

For more information about the Outreach section of the CORM software product, refer to the *DDRS Outreach User Guide*.

1.2. Product Support

You can access the most recent version of this guide and other CORM-related documents online. Use the following website URL to access the CORM document library in the DDRS website:

<https://myshare.in.gov/fssa/ddrs/CORM/Forms/AllItems.aspx>

If you encounter a problem with the Crisis product, or if you have a question or recommendation regarding this user guide, log a [HelpBox](#) request. A member of the FSSA Technology Services Team (FTST) will contact you to address the issue.

2. System Setup and Login

Before you can use the CORM product, you must:

- Determine whether your system meets the recommendations for running the CORM product.
- Set Microsoft Internet Explorer as your default Internet browser.
- Download and install the CORM product.
- Log in to the CORM product.

2.1. System Recommendations for Running the CORM Product

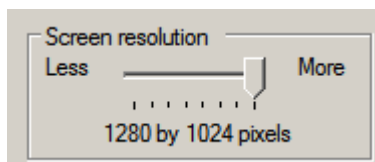
For best results, run the CORM product with the following parameters:

- 1024 x 768 pixels screen resolution
- Internet Explorer as your [default browser](#)
- Latest version of [Adobe Reader](#)
- A high-speed Internet connection (for example, DSL, cable modem, or T1 line)

2.1.1. Setting the Screen Resolution on Your Computer

For best results while viewing the CORM product interface, your computer screen resolution should be set to 1024 x 768 pixels or higher. Use the following procedure to set the screen resolution on your computer to the highest setting.

1. Right-click on your desktop and select **Properties** from the shortcut menu. The **Display Properties** window appears.
2. Select the **Settings** tab.
3. Drag the slider in the Screen resolution section as far to the right as possible to increase the screen resolution to the highest setting. The following illustration shows an example of the Screen resolution section of the **Display Properties** window:

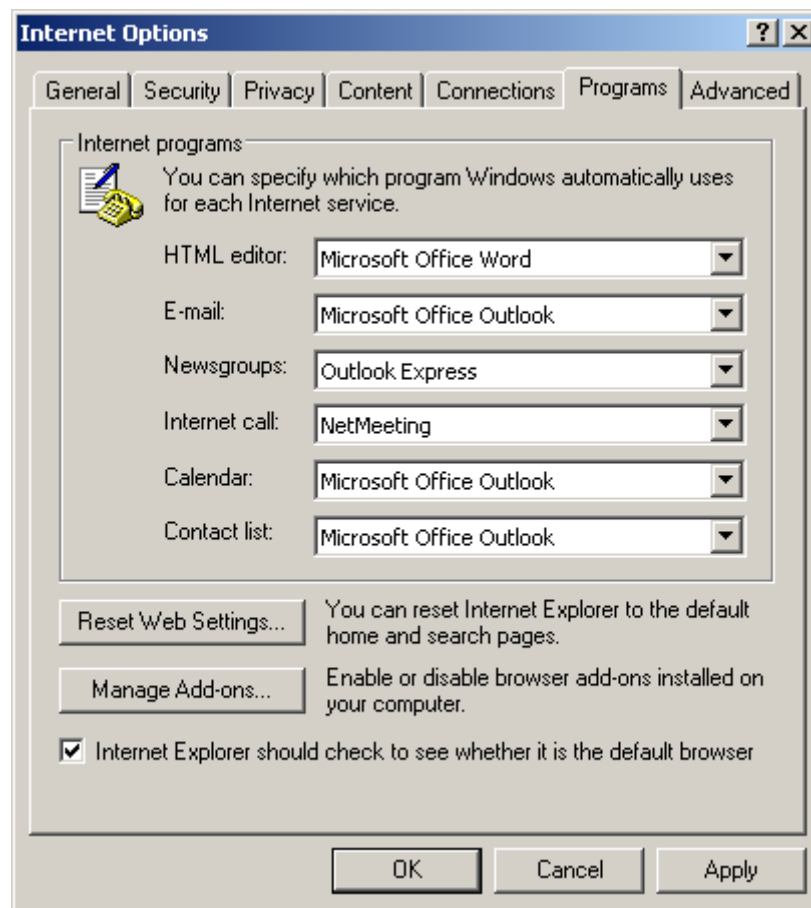


4. Select **Apply** and then **OK**.

2.1.2. Setting Microsoft Internet Explorer as Your Default Internet Browser

Before downloading the CORM product, you must verify that Microsoft Internet Explorer is set up as your default Internet browser. If your system uses a different browser, you can use the following procedure to set Internet Explorer as your default Internet browser.

1. Open Internet Explorer and select the **Tools** menu.
2. Select **Internet Options**. The **Internet Options** window appears, as shown in the following illustration:



3. Select the **Programs** tab in the **Internet Options** window.
4. Verify that the **Internet Explorer should check to see whether it is the default browser** check box is checked.
5. Select **Apply** and then **OK**.

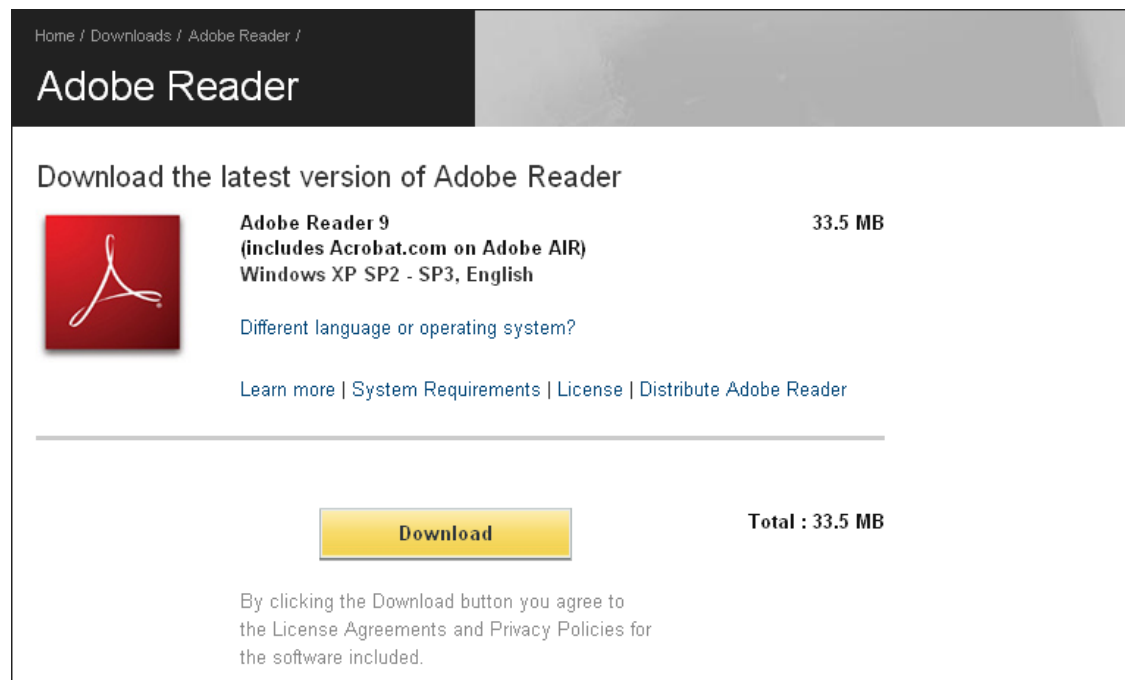
2.1.3. Installing and Testing the Latest Version of Adobe Reader

You can access the most updated copy of this user guide and other documentation from the DDRS website. To view the documents, you must install the Adobe Reader on your computer. Use the following procedure to install and test the latest version of Adobe Reader on your computer (the procedure assumes that you have not installed the Adobe DLM ActiveX control).

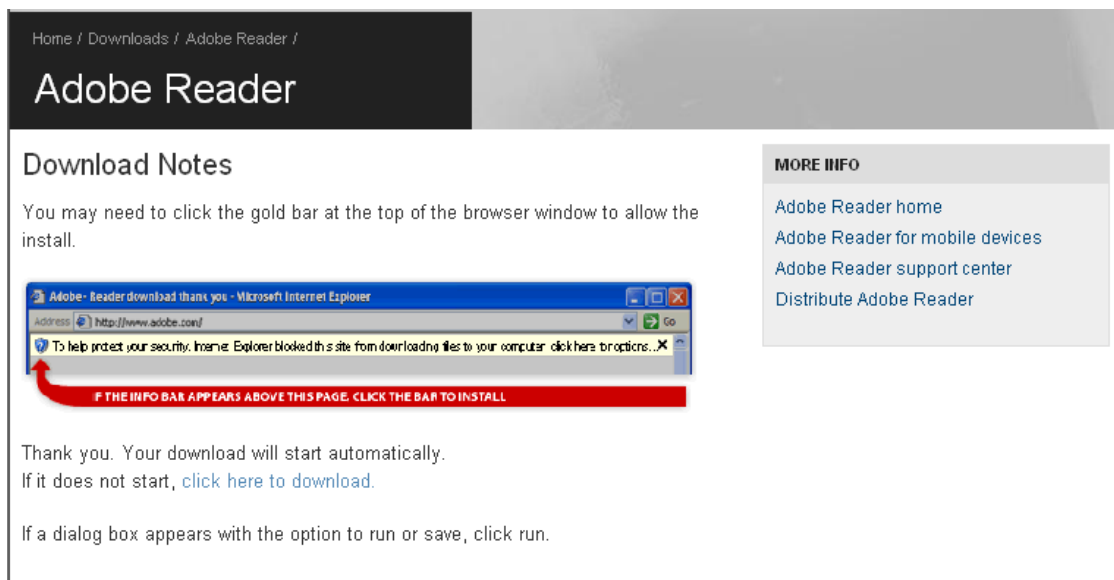
1. Select the following link or enter the URL into the **Address** field of your browser:

<http://www.adobe.com/products/acrobat/readstep2.html>

The Adobe Reader web page appears, as shown in the following illustration:



2. Select the gold **Download** button. The system displays the following screen and a gold bar appears at the top of your browser window:



3. Select **Click here to install** from the gold bar at the top of the browser window, and then select **Install ActiveX Control** from the shortcut menu that appears.
4. Select **Install** in the **Internet Explorer - Security Warning** window that appears.
5. Wait several seconds as one or more Adobe progress windows appear, indicating the progress of the installation. When the installation is complete, the **getPlus: Info** window appears and indicates that the installation is complete.
6. Select **OK** in the **getPlus: Info** window.
7. Test the Adobe Reader installation by selecting a PDF file from either the network or a SharePoint site.

Tip

Select the following link to display a SharePoint page that contains multiple PDF files that you can use:

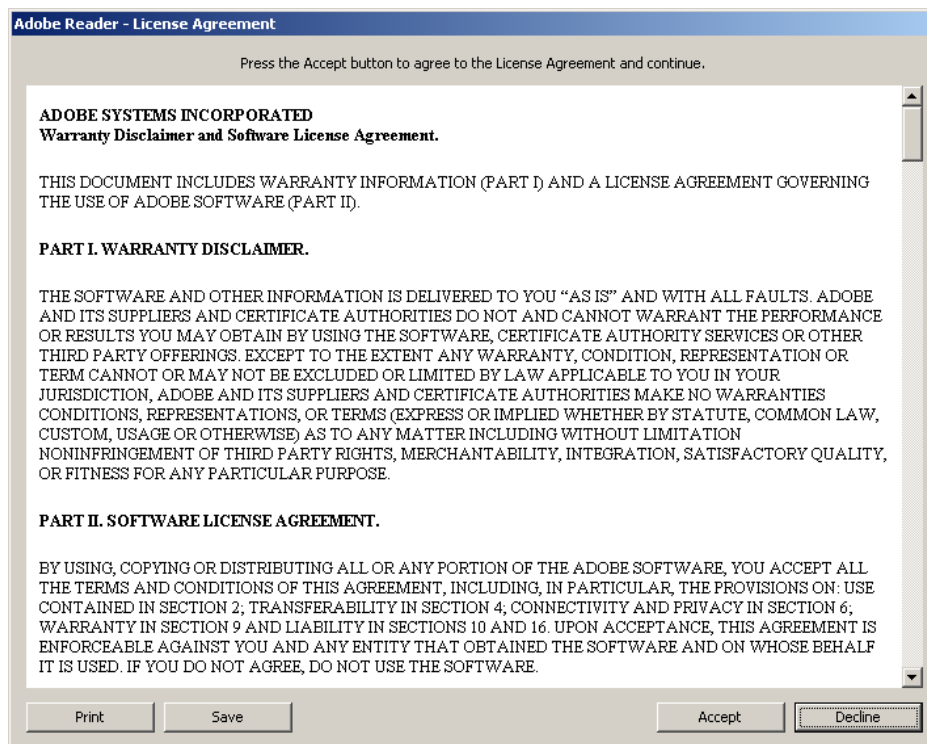
<https://myshare.in.gov/FSSA/ddrs/WebBased%20Tools/Forms/AllItems.aspx>

-
8. Ensure that the **Read Only** radio button is selected in the **Microsoft Internet Explorer** window that appears and then select **OK**.

The following illustration shows an example of the **Microsoft Internet Explorer** window:



Because this is the first PDF you have opened after installing the Adobe Reader, the **Adobe Reader – License Agreement** window appears, as shown in the following illustration:



9. Select **Accept** to display the PDF file for the document you selected.

The **Adobe Reader – License Agreement** window appears only once. After you perform the remaining steps in this procedure, the license agreement will not appear again when you select a PDF file.

2.2. CORM Download and Installation

To use the CORM product, you must first install the interface software to your PC. Use the following procedure to download and install the CORM software.

Important

The CORM product uses the Microsoft .Net Framework 3.0 programming model, which requires that a user with administrative rights perform the installation. Subsequent user-specific setup and use of the CORM product does not require administrative rights.

If your PC does not have the Microsoft .Net Framework 3.0 programming model, the system loads it automatically and then resumes the CORM installation.

1. Select the following link or manually enter the following URL into your browser's **Address** field:

<http://ddrsprovider.fssa.in.gov/corm/publish.htm>

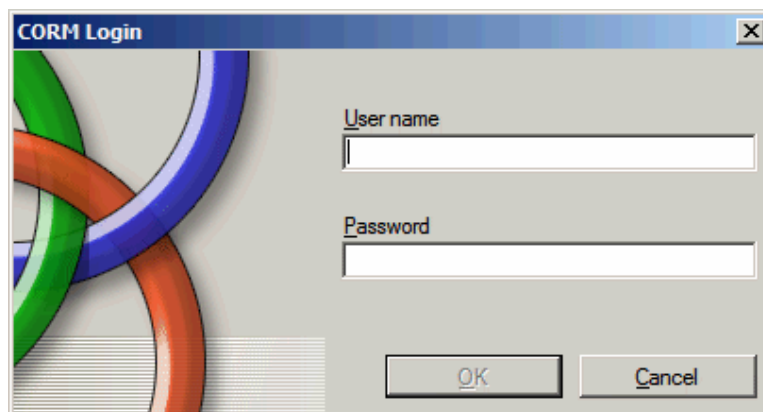
The following screen appears:



2. Select **Install**.
3. Select **Run** in the **File Download – Security Warning** window.
4. Select **Run** in the **Internet Explorer – Security Warning** window.
5. Select **Install** in the **Application Install – Security Warning** window.

2.3. CORM Login

After the system completes the CORM installation procedure, the **CORM Login** window appears. The following illustration shows an example of the **CORM Login** window:



Enter your user name and password, and then select **OK**. During the login process, the CORM product evaluates your user information to determine your user role (for example, Crisis or Outreach) and access level. The system modifies the appropriate windows, tabs, and menus according to your role, and applies the appropriate capability limitations. For example:

- Crisis-related windows and tabs display read-only information for an Outreach user, and vice versa.
- If your role is a manager, you can perform additional functions, such as closing and deleting episodes.

3. Concepts and Terminology

A consumer is a person with a developmental disability who receives Crisis or Outreach services. While *client*, *customer*, and *individual* are also terms used to describe a consumer in other documentation or programs, every effort has been made to use *consumer* exclusively in the CORM product and product documentation.

3.1. Episode

An episode is an event or situation that requires input into the CORM product. A CORM episode describes the time period of the situation and the activities that occur. Most episodes consist of a clear beginning and end, and can involve multiple individuals who add a service entry and [service note](#) to the CORM product to document their efforts.

3.2. Read-Only User Role

The Read-Only user role limits the menus that are available to a user and limits the user's capabilities on the system. You must contact the FTST via [HelpBox](#) to request that a user be assigned this role. For more information about the Read-Only role, refer to [Section 6.7: Viewing Episodes as a Read-Only User](#).

3.3. Service Entry

A service entry is a line of information that describes an action (for example, the initial call, a referral, or an in-home consultation) that occurred on an episode. Service entries appear in a grid in the [work area](#). The grid contains several columns of information.

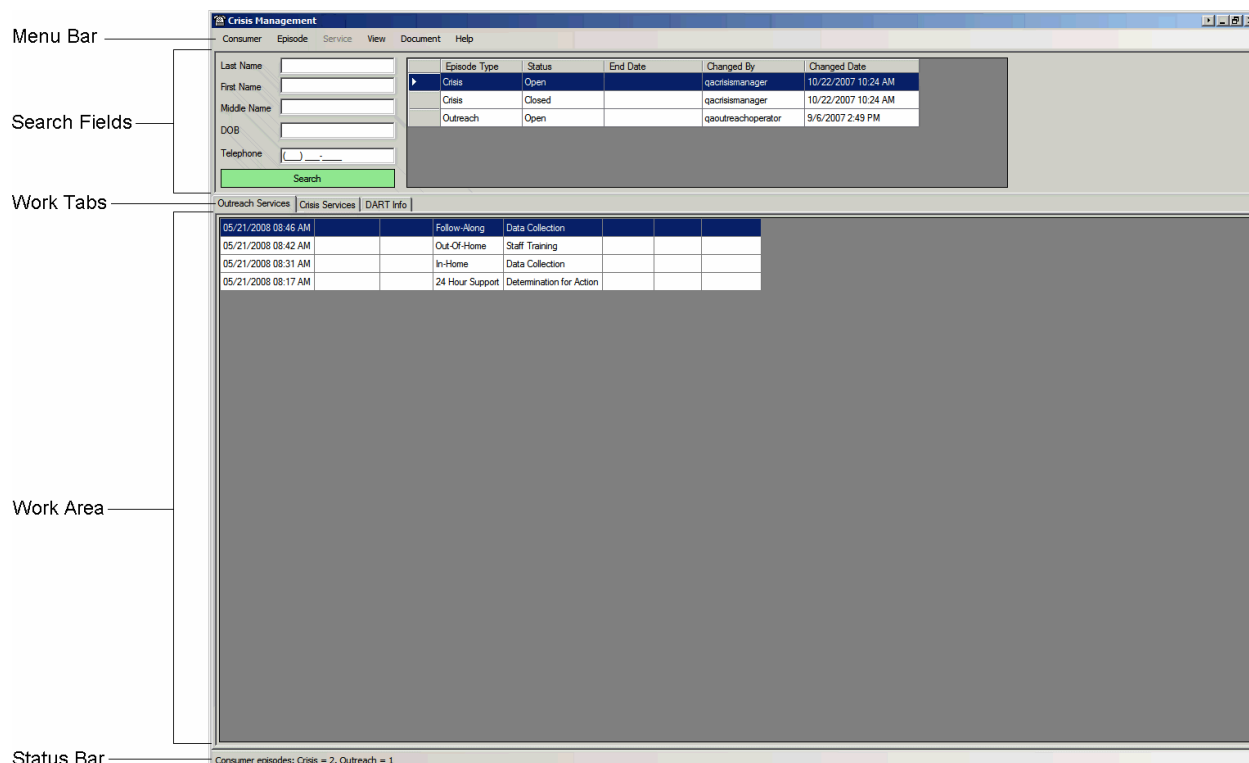
Example: Episode with Service Entries

A DD consumer in a group home begins hitting his housemates. A Crisis call is placed, and the clinician who receives the call starts a new episode in the CORM product and adds a service entry to document the call. She then visits the group home for evaluation, and adds another service entry to document her visit.

During the next two weeks, additional house visits are made and corrective actions are taken to alleviate the situation. Each person who performs a service for the consumer adds a service entry to the episode to document their action. After the DD consumer stops hitting people, the episode is closed in the CORM product.

4. The CORM Screen

After you log in, the CORM screen appears. The following illustration shows an example of the CORM screen, and calls out the major screen elements. (The graphic is a composite illustration for training purposes. Your screen will appear different):



CORM Screen Elements

Screen Element	Description
Menu bar	The menu bar contains menus that you can use to manage consumer and episode information in the CORM product. The menu labels and many menu items contain hot keys that you can use to quickly access a menu.
Search fields	Use the search fields to locate an existing consumer record or to start the process of adding a new consumer record to the system.
Work tabs	Use the work tabs to display Outreach, Crisis, or DART information.
Work area	The work area displays Outreach and Crisis service entries, and DART information for the consumer, according to the work tab that you select.
Status bar	The Status bar displays the number of current and previous Crisis and Outreach episodes that the consumer has had.

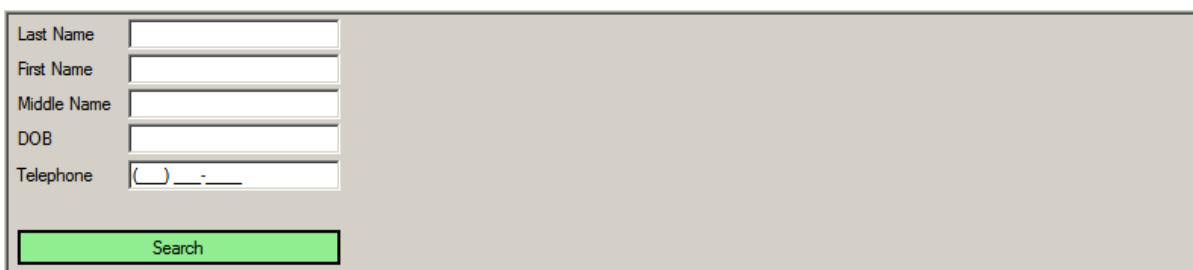
5. Working With a Crisis Consumer

The CORM product is controlled primarily through consumer access and [episode](#) access. This section describes how to use the CORM product to work with a Crisis consumer, and provides procedures that you can use to:

- Search for a consumer
- [Add](#) a consumer
- Identify and use the [work area](#)
- Add a [service entry](#) on a consumer
- [Change](#) a service entry on a consumer
- Use the [Call Information window](#)
- Use the [Out-Of-Home window](#)
- Use the [Consumer Contacts window](#)
- Run the [Consumer Episodes report](#)

5.1. Searching For a Consumer

You can use the search fields to search for a consumer or [add](#) a new consumer. The following illustration shows the search fields:



To search for a consumer, enter information into one or more of the search fields and select **Search**. The more information you provide, the more accurately the system can perform the search.

The system searches for a consumer based on the information that you enter, and one of the following events occurs:

- The system matches the search information to [one consumer](#).
- The system matches the search information to [multiple consumers](#).
- The system does not match the search information to a consumer and prompts you to [add](#) the consumer.

5.1.1 One Consumer Matches

When the system matches the search information to one consumer, the system displays the Crisis and Outreach [episodes](#) for the consumer. Both open and closed episodes appear, as shown in the following illustration:

Consumer		Episode				
Last Name	STAFFORD	Episode Type	Status	End Date	Changed By	Changed Date
First Name	JASON	▶ Crisis	Open		qacrisismanager	3/26/2008 4:07 PM
Middle Name	HOWARD	Crisis	Closed	2/27/2008 10:55 AM	qacrisismanager	2/27/2008 10:55 AM
DOB	10/10/1938	Crisis	Closed	3/26/2008 4:07 PM	qacrisismanager	3/26/2008 4:07 PM
Telephone	(765) 555-1234	Outreach	Open		qaoutreachoperator	9/6/2007 10:40 AM
New Search						

Opening an Episode

You can open an episode for the current session type (for example, an Outreach episode while logged on as an Outreach user) that is in Open status by double-clicking on the record. When you open an episode, the **New Search** button changes to **Episode List** and additional consumer information appears to the right of the search fields, as shown in the following illustration:

Consumer		Episode					
Last Name	STAFFORD	Age	69	Address	112 W. 3RD ST	SSN	123-45-6783
First Name	JASON	Gender	M	City	MUNCIE	Waiver	
Middle Name	HOWARD			State	IN	Zip	47304
DOB	10/10/1938			County	DELAWARE	Setting	NA
Telephone	(765) 555-1234					Status	Referral
Episode List				Edit		Presumptive DD Eligibility	
						Eligible <input type="checkbox"/>	

While the additional fields that appear in this mode are read-only, the episode is open and you can add or change [service entries](#). You can select the **Episode List** button to return to the list of episodes for the consumer. The **Presumptive DD Eligibility** button does not appear for an Outreach episode.

Viewing Closed and Opposite Session Type Episodes

You can view information about a closed episode or an episode for the opposite session (for example, an Outreach episode while logged on as a Crisis user) by clicking once on the episode in the list. The service entries for the episode appear in the work area, and you can use the **Service** menu to view the following additional information about the episode:

- [Details](#)
- [Notes](#)
- [Reasons](#)

5.1.2 Multiple Consumers Match

When the CORM product matches [search](#) information to multiple consumers in the system, the Consumers Found grid displays a list of the consumers and some of their demographic information, as shown in the following illustration:

Consumer Episode Service View Document Help

Last Name: First Name: Middle Name: DOB: Telephone:

Consumers Found: 10

LastName	FirstName	MiddleName	DateOfBirth	HomePhone	CustStatus
STAFFORD	AKELA	ROSE	6/4/2004	3178657164	ELIGIBLE
STAFFORD	ANDY		8/1/1973	8126494078	ELIGIBLE
STAFFORD	ARDEN		3/24/1983	0000000	ELIGIBLE
STAFFORD	DENNIS		10/10/1938	7656648594	ELIGIBLE
STAFFORD	JASON	HOWARD	10/10/1938	7655551234	Referral

If you select a consumer with an open episode, the system displays the same information for the consumer as when the search yields a [single match](#).

If you select a consumer that does not have an open episode, the system prompts you to open a new episode.

5.2. Adding a Consumer

When the CORM product does not match [search](#) information to a consumer in the system, the **Add New Consumer** window appears so that you can manually input demographic information for the new consumer.

The following illustration shows an example of the **Add New Consumer** window:

Add New Consumer

Last Name: SSN:

First Name: Address:

Middle Name: City:

DOB: State: Zip:

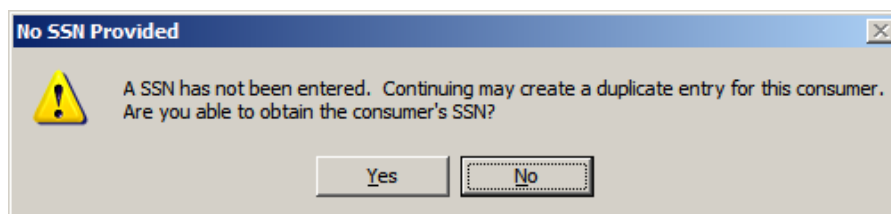
Telephone: County:

Gender: ☐ Male ☐ Female

Complete the information in the **Add New Consumer** window and select **OK**.

Important

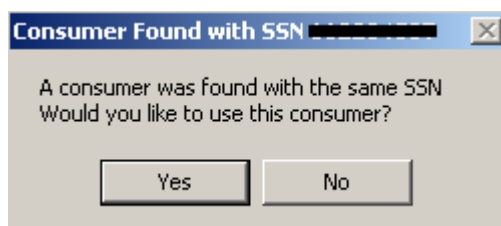
If you submit the **Add New Consumer** window without entering an SSN, the system displays the following message to help prevent the creation of a duplicate entry for the same consumer in the CORM product:



Select **Yes** to return to the **Add New Consumer** window so that you can enter an SSN.

Select **No** to skip this step and submit the information to the CORM product.

If the **SSN Field** contains a number that matches an existing SSN when you submit the **Add New Consumer** window, the system displays the following message to help prevent the creation of a duplicate entry for the same consumer in the CORM product:



Select **Yes** to use the identified consumer.

Select **No** to return to the **Add New Consumer** window so that you can enter a different SSN.

After you complete the information in the **Add New Consumer** window, the system adds the information to the demographic fields in the search area and displays the following prompt:

This consumer does not have any episodes. Would you like to open a new one?

Select **Yes** to open a new episode for the consumer.

By default, the system selects one of the following service types and then displays the [Select a Service Description](#) window:

- **24 Hour Support** for a Crisis episode.
- **Admin Support** for an Outreach episode.

Select a description for the [new service entry](#) or select the **Cancel** button in the **Select a Service Description** window (you can complete the information in this window later). One of the following events occurs:

- The [Call Information](#) window appears for a new Crisis episode, regardless of the service description that you choose. Complete the information in the **Call Information** window or select the **Cancel** button (you can complete the information in this window later).
- The [Outreach Details](#) window appears for a new Outreach episode when you accept the default **Referral** service description. Complete the information in the Outreach Details window or select the **Cancel** button (you can complete the information in this window later).

The **Edit** button and **Presumptive DD Eligibility** button appear in the search area for a new Crisis consumer, as shown in the following illustration:

The screenshot shows a web form for searching for a consumer. The form is titled 'Call Service Help' at the top. It contains several input fields for personal and contact information, organized into two main columns. The left column includes fields for Last Name, First Name, Middle Name, DOB, and Telephone. The right column includes fields for Age, Gender, Address, City, State, Zip, County, SSN, Waiver, Setting, Status, and Eligible. A green 'New Search' button is located at the bottom left. At the bottom right, there are two buttons: 'Edit' and 'Presumptive DD Eligibility', which are circled in red in the original image.

Last Name	Simpson	Age	10	Address	123 E. MAIN ST.	SSN	123-45-6789
First Name	Barthalamew	Gender		City	MUNCIE	Waiver	
Middle Name				State	IN	Zip	47304
DOB	01/19/1968			County	DELAWARE	Setting	NA
Telephone	() - -					Status	Referral
						Eligible	<input type="checkbox"/>

New Search Edit Presumptive DD Eligibility

Important

The **Presumptive DD Eligibility** button also appears when you select an open Crisis episode with a status other than Eligible or Ineligible.

The **Presumptive DD Eligibility** button does NOT appear for an Outreach episode.

Select the **Edit** button to display the **Edit Consumer** window, which you can use to add or change information about a Crisis or Outreach consumer.

Select the **Presumptive DD Eligibility** button to display the **Presumptive DD** window, shown in the following illustration, which you can use to perform a preliminary determination of a new Crisis consumer's eligibility for services:

The screenshot shows a software window titled "Presumptive DD". It contains several sections for data entry:

- Prior BDDS/DD Services:** A checkbox for "Previously In BDDS/DD Services" and a text field for "Description".
- Special Education:** A checkbox for "Are you in or ever have been in special education".
- Development Disability Testing:** A checkbox for "Have you ever had developmental disability testing done", a text field for "Testing of", a text field for "Tester", and a date dropdown for "Completed On" (set to 8/17/2007).
- Eligibility Criteria:** A large section with checkboxes and descriptive text for:
 - ☐ Mental Impairment (Not a Mental Illness)
 - ☐ Evidence of Significant Disabilities That Began Before Age 22
 - ☐ 3 Or More Substantial Limitations
 - ☐ Self Care - Does the individual require physical or non-physical assistance in performing eating, hygiene, grooming, or health care skills, or in the case of a child does the parent, caregiver, or school
 - ☐ Receptive and Expressive Language - Is the individual unable to communicate effectively without the aid of a third person, a person with special skills, or without an assistive device (such as sign language)
 - ☐ Learning - Does the individual have difficulty learning new skills either verbally or visually, retaining and remembering skills, and reasoning how and why to perform skills such that special learning techniques beyond those that an individual normally needs to learn is required for the development of social, self care, language, academic, or vocational skills.
 - ☐ Mobility - Does the individual need the assistance of another person or an assistive device for movement from place to place or in the case of a child is the child's postural control and movement and coordinated use of muscles substantially below what is typically expected of children of the same age.
- Completion Details:** Text fields for "Informant" and "Completed On".

At the bottom right are "OK" and "Cancel" buttons.

5.3. The Work Area

After you open an [episode](#) for a [consumer](#), the work area on the CORM screen displays the:

- Work tabs
- [Service entry grid](#)

The following partial illustration shows an example of the work tabs and service entry grid:

Work tabs

Service entry grid

Date	Completed Date	Voided Date	Service Type	Service Description	Referred To	Disc
04/07/2008 03:40 PM			In-Home	Direct Service		
04/07/2008 08:59 AM			Out-Of-Home	Data Collection	Behavioral Consultant	Beha
03/27/2008 02:06 PM			Out-Of-Home	Coordination of Care / Transition Planning	Psychiatric Services	Psyc
03/27/2008 11:58 AM		04/07/2008	24 Hour Support	Determination for Action		

5.3.1 Work Tabs

Work tabs provide fields that you can use to manage an [episode](#). The CORM product displays the following tabs in the work area:

- **Crisis Services**
- **Outreach Services**
- **DART Info**

The usability of the **Crisis Services** tab and **Outreach Services** tab is determined during login by your role. For example, if you log in as a Crisis user:

- The **Crisis Services** tab appears by default when you open an episode.
- You can enter or change information for Crisis episodes.
- The **Outreach Services** tab presents read-only information.

If you log in as an Outreach user:

- The **Outreach Services** tab appears by default when you open an episode.
- You can enter or change information for Outreach episodes.
- The **Crisis Services** tab presents read-only information.

The **DART Info** tab is available for both Crisis and Outreach users, and always presents read-only information.

See Also

For more information about the **DART Info** tab, refer to [Appendix B: DART Information Screens](#).

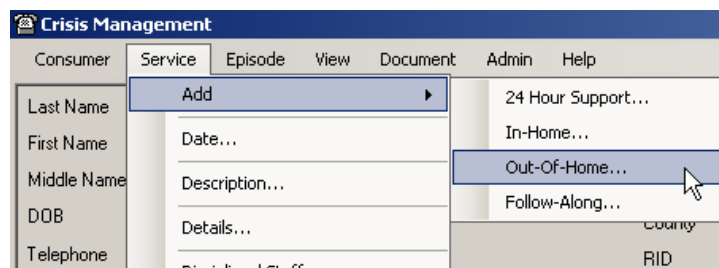
5.3.2 The Service Entry Grid

The service entry grid displays the [service entries](#) for the episode. Service entries contain detailed information about a service that a user provided to the consumer. The system automatically adds a new service entry when you [open](#) a new episode. You can also add a service entry manually.

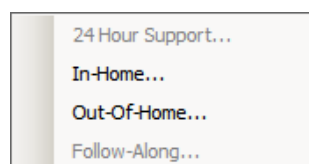
The service entry grid displays multiple service entries by date in descending order. You must select a service entry to add or [change](#) information. A selected service entry appears with a solid color and a white arrow in the left column, as shown in the illustration on the previous page.

5.4. Adding a Service Entry

After you open an [episode](#) for a new or existing consumer, you can add one or more [service entries](#). To add a service entry for an episode, open the **Service** menu, point to **Add**, and then select a service type from the pull-down menu, as shown in the following illustration:



The availability of the service types on the pull-down menu varies according to the latest service type selected. For example, if the consumer is in a **24 Hour Support** service type, you can select **24 Hour Support** or any of the other service types. If you add an **In-Home** service type, the system limits you to selecting another **In-Home** or an **Out-Of-Home** service type, as shown in the following illustration:



The following table defines the service types available:

Service Type Availability

With This Service Type Selected	You Can Add One of These Service Types
24 Hour Support	24 Hour Support In-Home Out-Of-Home Follow-Along
In-Home	In-Home Out-Of-Home
Out-Of-Home	Out-Of-Home Follow-Along
Follow-Along	Out-Of-Home Follow-Along

5.4.1 Product/Interventions Window

After you select a service type, the **Product/Interventions** window appears, as shown in the following illustration:

[Graphic]

Select one product for the service and one or more interventions to complete this window. The list of interventions changes according to the product that you select.

5.4.2 Communication Window

The **Communication** window appears after you complete the **Product / Interventions** window. You use the **Communication** window to indicate the types of communication used for the service. You can select multiple communication types, as shown in the following illustration:

[Graphic]

5.4.3 Location Details Windows

After you complete the **Communication** window, one of the following windows appears:

- **In-Home Off-Site Location Details** if the service type is In-Home Off-Site
- **Out-of-Home Location Details** if the service type is Out-Of-Home

- **Outcome Measures** if the service type is other than In-Home Off-Site or Out-Of-Home

The following illustration shows an example of the **In-Home Off-Site Location Details** window:

[Graphic]

You use this window to indicate where the consumer was when the service was administered.

The following illustration shows an example of the **Out-of-Home Location Details** window:

[Graphic]

You use this window to indicate who approved the Out-of-Home placement and provide basic information about the placement facility.

5.4.4 Outcome Measures Window

The **Outcome Measures** window appears after you complete the previous windows. You use this window to indicate the outcome of a service. You can select one or more outcomes, as shown in the following illustration:

[Graphic]

5.4.5 Service Notes Window

The [Service Notes](#) window appears after you complete the **Outcome Measures Window** so that you can quickly add a note to the service.

5.4.6 Service Time Management Window

After you add a note or cancel the **Service Notes** window, the system displays the **Service Time Management** window. You use this window to record the date and time of the service provided. For service types tied to contractual recording (for example, the first In-Home service added for a consumer), the **Service Time Management** window includes fields for the response time of the service. A **Justification** field becomes active (and required) if the response time falls outside of the contractual timeframe. The following illustration shows an example of the **Service Time Management** window for contractual recording:

[Graphic]

5.4.7 Trends Window

The Trends window is the last window to automatically appear in sequence when you add a new service. You can use this window to indicate one or more trends that have been recognized for the consumer, as shown in the following illustration:

[Graphic]

5.5. Changing a Service Entry

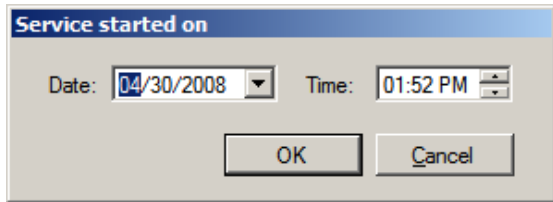
After you [add](#) a [service entry](#) to an [episode](#), you can use the **Service** menu to also change or add information to the service entry row in the work area.

Tip

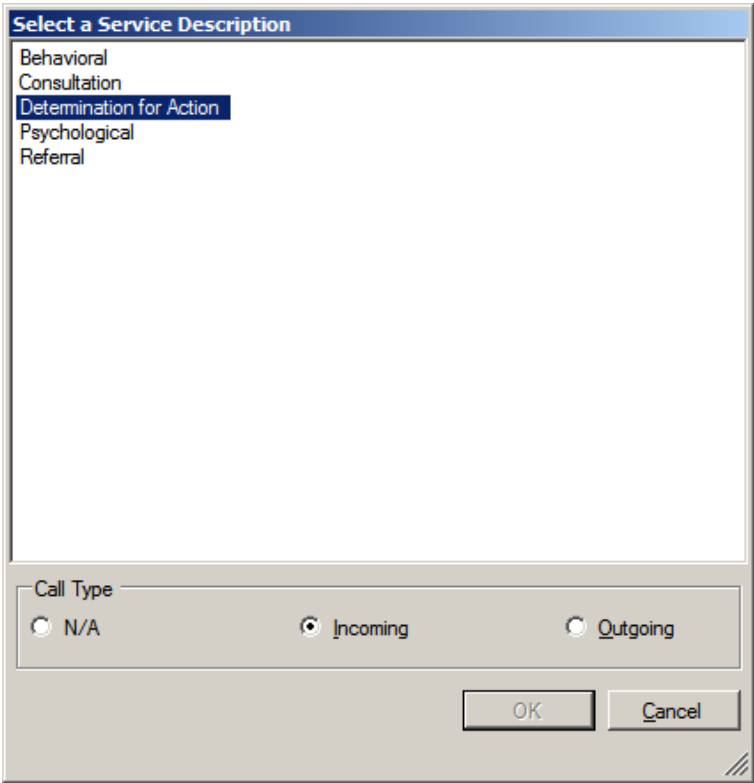
You are not required to change a service entry immediately after you add it. You can select the **New Search** button to return to the search fields and perform another search. You can change a service entry at any time.

The following table describes the **Service** menu items that you can use to change a service entry.

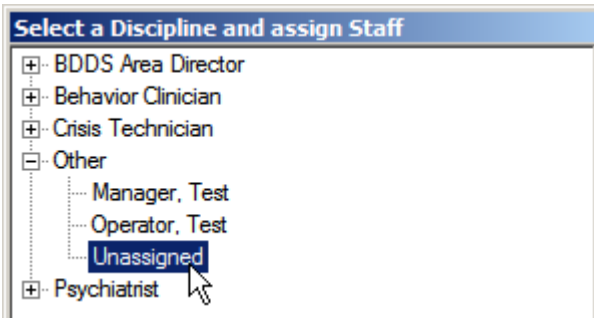
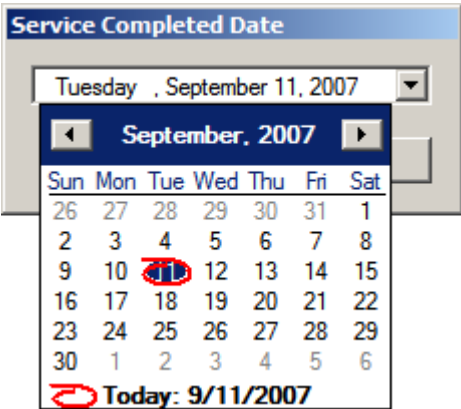
Service Menu Items

Item	Description
Date...	<p>Displays the Service Date window, which you can use to change the beginning date and time of the service to any current or past date and time combination. The following illustration shows an example of the Service Date window:</p> 

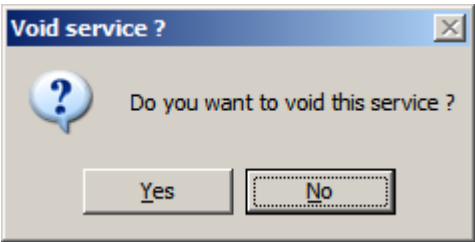
Service Menu Items (continued)

Item	Description
Description...	<p>Displays the Select A Service Description window that you can use to select the desired service description. The following illustration shows an example of the Select A Service Description window:</p>  <p>You can also use the radio buttons in the Call Type section at the bottom of the window to indicate whether the service is related to a phone call.</p>
Details...	<p>Displays the Call Information or Out-Of-Home window, depending on the service type you selected when you added the service.</p> <p>If you selected a 24-Hour Support service type, the Call Information window appears.</p> <p>If you selected an Out-of-Home service type, the Out-Of-Home window appears.</p> <p>A window does not appear if you select the Details menu item for an In-Home or Follow-Along service type.</p>

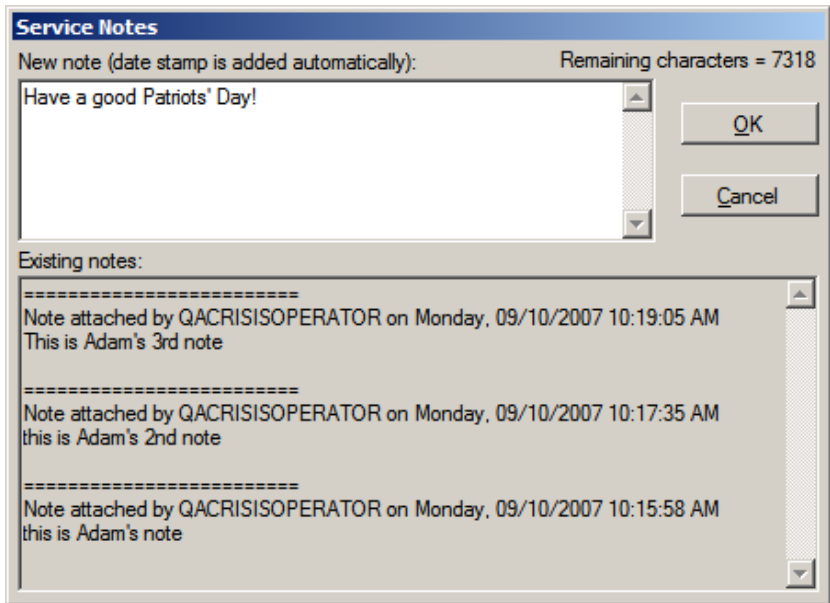
Service Menu Items (continued)

Item	Description
Discipline / Staff...	<p>Displays the Select a Discipline and assign Staff window that you can use to assign a staff member to the service.</p> <p>A decision tree appears when you select a discipline, branching out to display the staff names available for the discipline you select. The following partial illustration shows an example of the Select a Discipline and assign Staff window:</p> 
Mark as Completed	<p>Displays the Service Completed Date window, which you can use to mark a selected service entry as complete. Clicking the drop-down arrow displays the calendar, as shown in the following illustration:</p>  <p>You can use the calendar to search for a year, month, and day.</p> <p>You can select past and future dates.</p> <p>After you select a date, the date appears in the Completed Date column.</p>

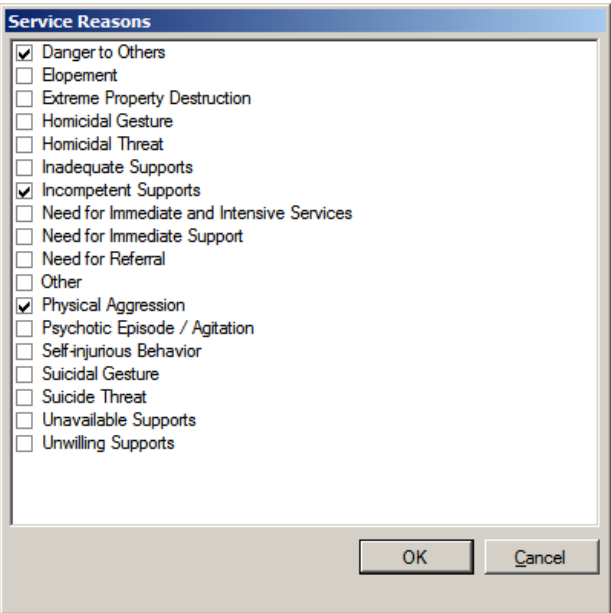
Service Menu Items (continued)

Item	Description
Remove Completed Date (manager function)	Removes the completed status on a selected service entry in the work area. (You must log in as a manager or director to perform this action.)
Mark as Voided	<p data-bbox="516 472 1409 541">Voids a selected service entry in the work area when you select Yes at the following prompt:</p> <div data-bbox="732 569 1203 808"></div> <p data-bbox="516 842 1409 911">A voided entry displays a different color of text (red text if your PC uses the default Microsoft color scheme) than non-voided entries.</p>
Remove Voided Date (manager function)	Removes the void status on a selected service entry in the work area. (You must log in as a manager or director to perform this action.)

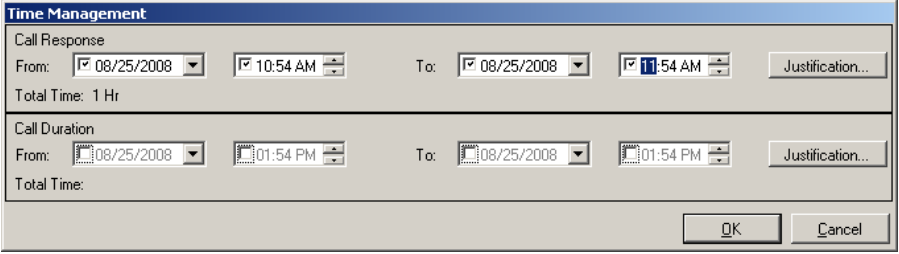
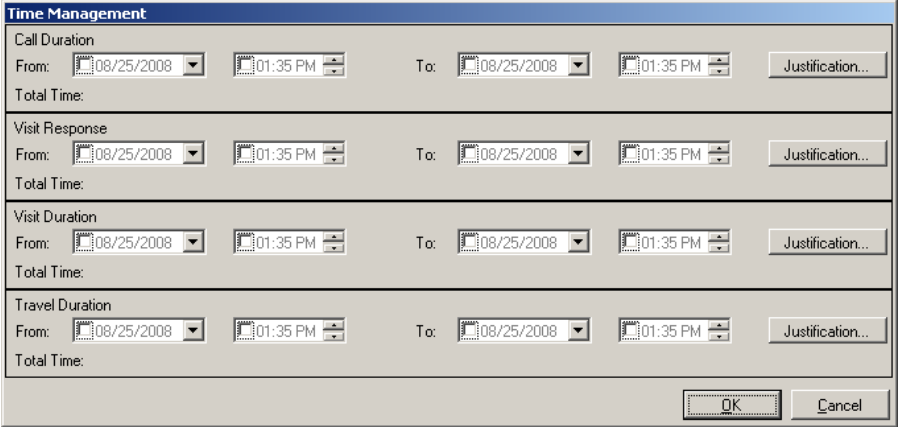
Service Menu Items (continued)

Item	Description
Notes...	<p>Displays the Service Notes window that you can use to view and add service notes (you can also double-click a service entry row to display the Notes window). The system displays the notes by date in descending order (newest note first), as shown in the following illustration:</p>  <p>To add a note, enter the note in the list box under Enter new note (date stamp is added automatically). You can also paste copied text from Microsoft Word into the list box. The system date-stamps and time-stamps the note and adds the note to the Existing notes area of the window.</p> <p>The Remaining characters field in the upper right corner decreases as you type or when you paste information, indicating the number of characters that remain from the 8,000-character limit that exists for the service. The field only shows 7,900 characters to compensate for the date stamp text. When the number of remaining characters falls below 100, the Remaining characters field turns red.</p> <p>When you reach the 8,000 character limit (or exceed the limit by pasting a note), the following message appears:</p> <p>You have entered or exceeded the maximum length of this note. Text may have been truncated beyond the maximum length of approximately 8000 characters.</p>

Service Menu Items (continued)

Item	Description				
Reasons...	<p>Displays the Service Reasons window so that you can select or unselect one or more reasons for the service requested for the episode. The following illustration shows an example of the Service Reasons window:</p> 				
Referred To...	<p>Displays the Service Referred To window that you can use to indicate a referral service used. Select one of the following valid entries from the list:</p> <table border="0"> <thead> <tr> <th data-bbox="573 1213 760 1245"><u>Crisis Services</u></th><th data-bbox="1003 1213 1230 1245"><u>Outreach Services</u></th></tr> </thead> <tbody> <tr> <td data-bbox="573 1255 862 1808"> Adult Protective Services BDDS Behavioral Consultant Day Services IU Medical Center Mental Health Center Neurology Occupational Therapy Other Outreach Physical Therapy Psychiatric Services Respite Riley Outpatient Clinic Social Organization Special Olympics Speech-Language Therapist/Counselor </td><td data-bbox="1003 1255 1292 1894"> 211 Services 911 Emergency Adult Protective Services APS BDDS BQIS Clinical Provider CMHC CPS Crisis Day Provider ER of Hospital Family/Self IDT IPMG/Case Manager IU Medical Center Other Residential Provider Riley Outpatient Clinic Risk Management Training </td></tr> </tbody> </table>	<u>Crisis Services</u>	<u>Outreach Services</u>	Adult Protective Services BDDS Behavioral Consultant Day Services IU Medical Center Mental Health Center Neurology Occupational Therapy Other Outreach Physical Therapy Psychiatric Services Respite Riley Outpatient Clinic Social Organization Special Olympics Speech-Language Therapist/Counselor	211 Services 911 Emergency Adult Protective Services APS BDDS BQIS Clinical Provider CMHC CPS Crisis Day Provider ER of Hospital Family/Self IDT IPMG/Case Manager IU Medical Center Other Residential Provider Riley Outpatient Clinic Risk Management Training
<u>Crisis Services</u>	<u>Outreach Services</u>				
Adult Protective Services BDDS Behavioral Consultant Day Services IU Medical Center Mental Health Center Neurology Occupational Therapy Other Outreach Physical Therapy Psychiatric Services Respite Riley Outpatient Clinic Social Organization Special Olympics Speech-Language Therapist/Counselor	211 Services 911 Emergency Adult Protective Services APS BDDS BQIS Clinical Provider CMHC CPS Crisis Day Provider ER of Hospital Family/Self IDT IPMG/Case Manager IU Medical Center Other Residential Provider Riley Outpatient Clinic Risk Management Training				

Service Menu Items (continued)

Item	Description
Time Management... (Crisis episodes only)	<p>Displays the Time Management window that you can use to record response times and durations.</p> <p>The size of the Time Management window varies according to the service type. For example, the following illustration shows an example of the Time Management window for a 24-Hour Support service type:</p>  <p>The following illustration shows an example of the Time Management window for In-Home, Out-Of-Home, and Follow-Along service types:</p>  <p>To change a date, select the check box in the field and search for the date in the drop-down calendar. You can use the calendar to search for a year, month, and day.</p> <p>To change a time, select the check box in the field and then select either the hour, minutes, or AM/PM indicator to activate the up and down arrows within the field. The up arrow increases the value, while the down arrow decreases the value.</p> <p>Select Justification to display the Justification window that you can use to explain a situation (for example, why a call response was so late or why the duration of a visit was exceedingly long).</p>

5.6. The Call Information Window

The **Call Information** window contains fields that you can use to document the demographic, referral, and emergency information from a Crisis call. The **Call Information** window appears when you:

- Open a new [episode](#) for a consumer.
- Select **Details** from the **Service** menu for a **24 Hour Support** [service entry](#).

The **Call Information** window is divided into the following sections that group the fields logically:

- **Call Information**
- **Immediate Danger**
- **Referral Information**

The following illustration shows an example of the **Call Information** window:

The screenshot displays the 'Call Information' window, which is divided into three main sections:

- Call Information:** Contains fields for 'Phone Number' (text input), 'Source Of Referral' (dropdown menu with 'Advocate' selected), and 'Location Of Person' (dropdown menu with 'Home' selected).
- Immediate Danger:** Contains fields for '911 Called By' (radio buttons for 'Self', 'Guardian', 'Support Center'), 'Agency Type' (dropdown menu with 'Police' selected), 'Agency Name' (text input), 'Agency Contact' (text input), 'Contact Phone Number' (text input), 'Who is in danger' (text input), 'What is the danger' (text input), and 'Indications' (text input).
- Referral Information:** Contains fields for 'Caller Last Name' (text input), 'Caller First Name' (text input), 'Company' (dropdown menu with 'Behaviorist' selected), 'Address' (text input), 'City' (text input), 'State' (text input with 'IN' selected), 'Zip Code' (text input), 'Contact Phone' (text input), 'FAX' (text input), 'Email' (text input), and 'Relationship' (dropdown menu with 'Guardian' selected).

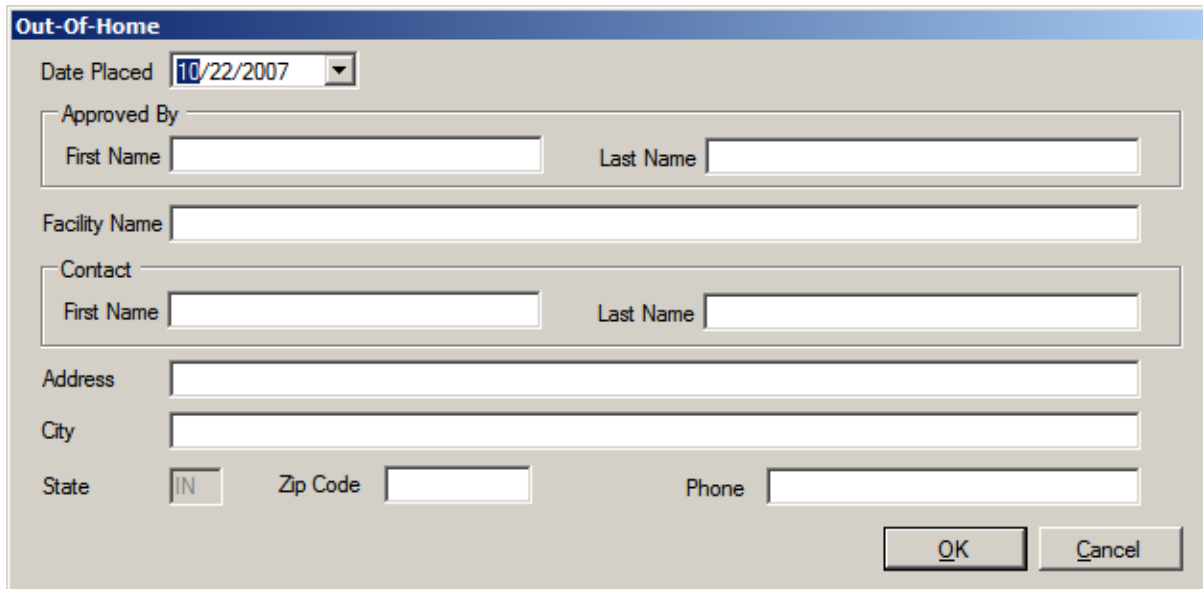
At the bottom right of the window are 'OK' and 'Cancel' buttons.

See Also

Refer to [Appendix A: Call Information Window Fields](#) for descriptions of the fields in the **Call Information** window.

5.7. The Out-Of-Home Window

The **Out-Of-Home** window contains fields that you can use to document information about an out-of-home placement for the consumer. The **Out-Of-Home** window appears when you select **Details** from the **Service** menu for an **Out-Of-Home** [service entry](#). The following illustration shows an example of the **Out-Of-Home** window:

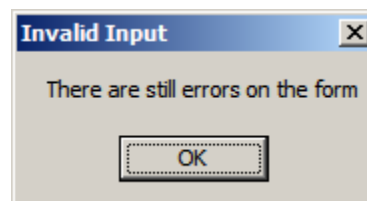


The screenshot shows the "Out-Of-Home" window with the following fields and controls:

- Date Placed:** A date picker showing 10/22/2007.
- Approved By:** A group box containing "First Name" and "Last Name" text input fields.
- Facility Name:** A single-line text input field.
- Contact:** A group box containing "First Name" and "Last Name" text input fields.
- Address:** A single-line text input field.
- City:** A single-line text input field.
- State:** A dropdown menu showing "IN".
- Zip Code:** A single-line text input field.
- Phone:** A single-line text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Important

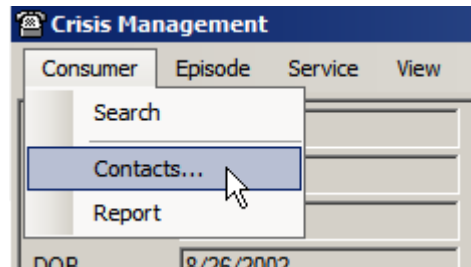
When you use the **Out-Of-Home** window, you must complete all of the fields in the window. If you attempt to save a partially completed window, the system highlights each empty field with an exclamation symbol and displays the following error message:



Select **OK** to remove the error message, and then complete the remaining fields in the window.

5.8. The Consumer Contacts Window

You can use the **Consumer Contacts** window to create one or more contacts for a consumer. To display the **Consumer Contacts** window, select **Contacts** from the **Consumer** menu, as shown in the following illustration:



The following illustration shows an example of the **Consumer Contacts** window:

A screenshot of the 'Consumer Contacts' window. It contains the following fields: 'Contacts' (a dropdown menu with 'Guardian' selected), 'Title' (text box with 'Guardian'), 'Name' (text box with 'Tom Rhoads'), 'Address' (text box with '123 W. Benjamin St.'), 'City' (text box with 'INDIANAPOLIS'), 'State' (text box with 'IN'), 'Zip Code' (text box with '46204'), 'Phone' (text box with '317-234-5678'), 'Fax' (empty text box), and 'Email' (text box with 'trhoads4@excite.com'). At the bottom are four buttons: 'Delete', 'New', 'Save', and 'Cancel'.

The **City** and **State** fields in the **Consumer Contacts** window are read-only. The system automatically populates these fields when you enter a postal code in the **Zip Code** field and press the **TAB** key or select another field with the mouse pointer.

After you complete and save the information in the **Consumer Contacts** window, the system applies the contact to the consumer (not to the [episode](#)). Deleting or closing an episode for a consumer does not delete a consumer contact. To delete a consumer contact, you must use the **Delete** button in the **Consumer Contacts** window.

5.9. The Consumer Episodes Report

The **Consumer Episodes** report contains detailed service information about the currently displayed consumer. You can expand or contract sections of the report to show or hide information.

To run the **Consumer Episodes** report, select **Report** from the **Consumer** menu. The following illustration shows an example of the **Consumer Episodes** report with several sections expanded, including the **Notes** section for the **In-Home** service:

CORM Consumer Report					
<div> <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> </div> </div>					
Consumer Episodes					
Crisis				Consumer Count	1
<div> <div>PHILLIP</div> </div>				Service Count	3
Service Type	Service Description	Service Start Date	Referred To	Staff Type	Serv. Attributes
24 Hour Support	Behavioral	6/16/2008 1:40:19 PM	Manager, Test	Other	
<div> <div>Notes</div> <div>Call Information</div> <div>Referral Information</div> <div>Immediate Danger</div> <div>Out-Of-HOME</div> </div>					
In-Home	Evaluation and Assessment	6/23/2008 7:42:39 AM	Manager, Test	Other	N
<div> <div>Notes</div> <div>=====</div> <div>Note attached by QACRISISMANAGER on Tuesday, 06/24/2008 11:20:51 AM</div> <div>After receiving initial phone call, BM determined that additional information is required.</div> <div>Call Information</div> <div>Referral Information</div> <div>Immediate Danger</div> <div>Out-Of-HOME</div> </div>					
Out-Of-Home	Coordination of Care/ Transition Planning	6/23/2008 7:43:13 AM	Manager, Test	Other	
<div> <div>Notes</div> <div>Call Information</div> <div>Referral Information</div> <div>Immediate Danger</div> <div>Out-Of-HOME</div> </div>					

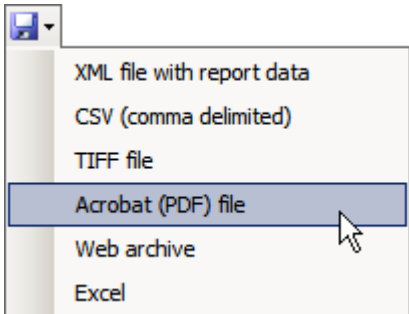
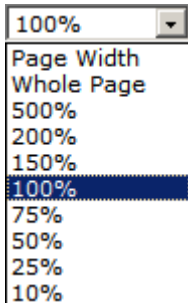
5.10. The Report Toolbar

Some of the icons and buttons on the **Consumer Episodes** report toolbar become active by default when you run the report. The following table explains the toolbar icons and buttons that you can use in the **Consumer Episodes** report:

Toolbar Icons and Buttons

Icon or Button	Description
<p>Page navigation</p>	Use these buttons to move from page to page in the report. You can select one of the identified buttons to move to that page, or enter the page number in the window and press ENTER .
<p>Refresh</p>	Use this icon to reset the report to the first page.
<p>Print</p>	Use this icon to print a copy of the report.
<p>Print Layout</p>	Use this icon to display the report in print preview mode.
<p>Page Setup</p>	<p>Use this icon to display the Page Setup window that you can use to change the following parameters of the report:</p> <ul style="list-style-type: none"> • Paper size and source • Orientation (for example, Portrait or Landscape) • Margins • Printer and printer properties

Toolbar Icons and Buttons (continued)

Icon or Button	Description
<p>Export</p> 	<p>Use this icon to save the report as a file in a different format. For example, to create a PDF file for better viewing and printing, select Acrobat (PDF) file. The system displays the Save As dialog box that you can use to navigate to the desired folder.</p>
<p>Zoom field</p> 	<p>Use the zoom field to select the viewing size of the report. The system defaults to 100%. Select a higher value to increase the size of the report, or a lower value to decrease the size of the report.</p> <p>You can also select Whole Page to view the entire report on your screen, or Page Width to set the zoom factor according to the width of the report.</p>

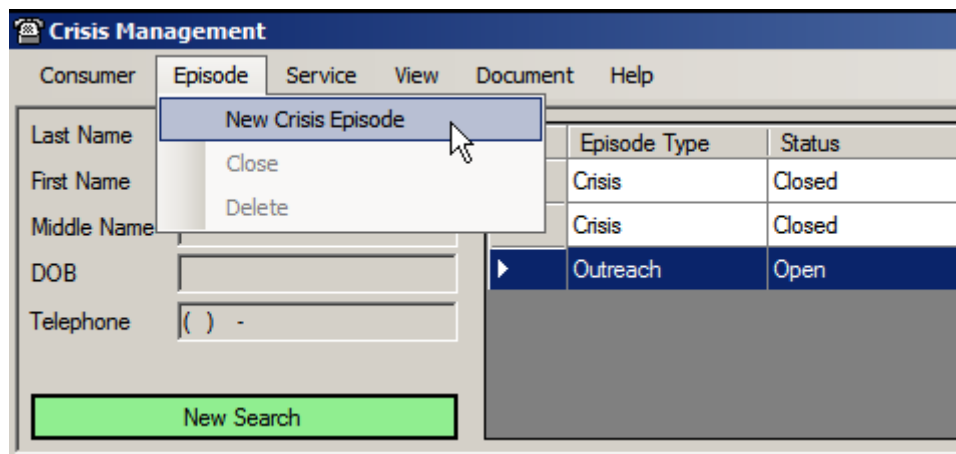
6. Working with Episodes

This section describes how to view, access, and control [episodes](#) in the CORM product, and provides procedures that you can use to:

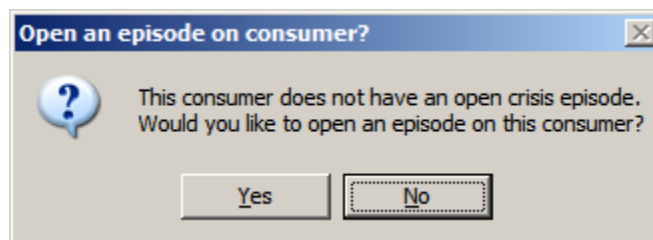
- Open a new episode for a consumer
- [Close](#) an episode (manager function)
- [Delete](#) an episode (manager function)
- [View](#) the open episodes on the system
- [View](#) the closed episodes on the system
- [View](#) previously displayed consumer records
- [Attach](#) (upload) a document to an episode
- [View](#) (download) a document on an episode

6.1. Opening a New Episode for a Consumer

You can open a new [episode](#) for a consumer if a current episode does not exist for the consumer. To open a new episode, select the **Episode > New Crisis Episode** menu, as shown in the following illustration:



The following prompt appears:

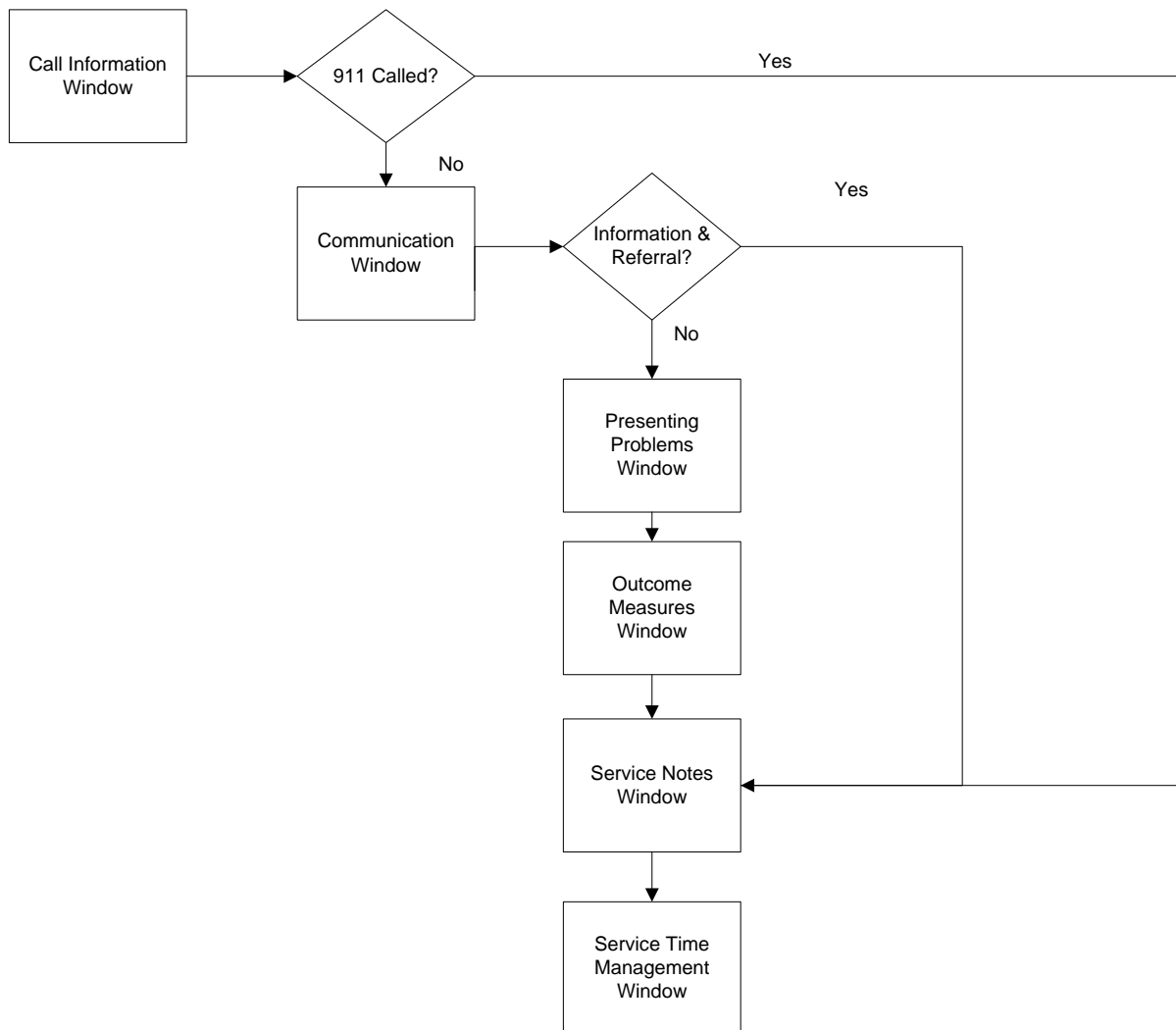


Select **Yes** to open an episode for the consumer.

6.1.1 New Episode Workflow

The following illustration shows the workflow that occurs when you open a new episode for a consumer.

New Episode Workflow



6.1.2 Call Information Window

When you open a new episode, the system selects the **24 Hour Support** service type and displays the [Call Information](#) window by default. Complete as much information in the **Call Information** window as possible.

Important

The following fields from the **Call Information** section of the **Call Information** window are required before you can move to the next window (you can complete the remaining fields in the window later):

- **Caller Last Name**
 - **Caller First Name**
 - **Phone Number**
 - **Initial Residential Setting**
-

6.1.3 911 Called By Section

If you complete the **911 Called By** section of the **Call Information** window, the system automatically displays the [Service Notes](#) window.

If you do not complete the **911 Called By** section of the **Call Information** window, the **Communication** window appears.

6.1.4 Communication Window

You use the **Communication** window to indicate the types of communication used for the service. You can select multiple communication types, as shown in the following illustration:

[Graphic]

Information and Referral

6.2. Closing an Episode (Manager Function)

If you possess the Manager or Director role in the CORM product, you can close an open episode by selecting **Close** from the **Episode** menu. The system prompts you to choose a date and time for the closure, as shown in the following illustration:

A dialog box titled "Episode closed on" with a blue header bar. It contains two input fields: "Date:" with a dropdown menu showing "01/18/2008" and "Time:" with a dropdown menu showing "10:33 AM". Below these fields are two buttons: "OK" and "Cancel".

Episode closed on

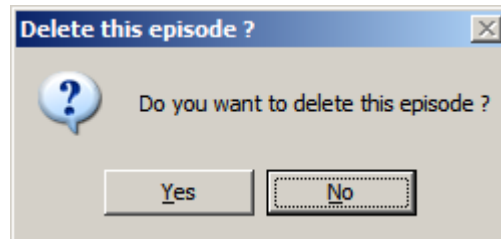
Date: 01/18/2008 Time: 10:33 AM

OK Cancel

Select the date and time on which the episode was officially closed and select **OK**.

6.3. Deleting an Episode (Manager Function)

If you possess the Manager or Director role in the CRISIS product, you can delete an open episode by selecting **Delete** from the **Episode** menu. Select **Yes** at the following prompt:



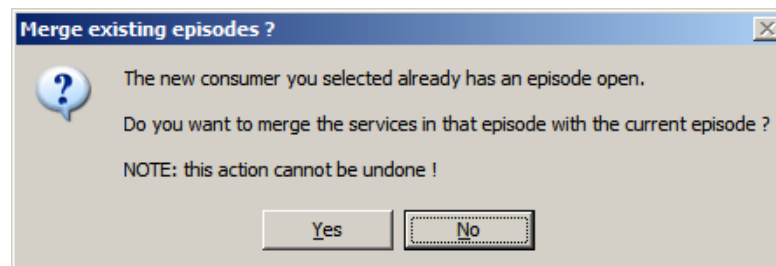
6.4. Viewing the Non-Person Episodes on the System (Outreach Episodes only)

You can view the [non-person episodes](#) on the system by selecting **Non Person** from the **View** menu. The system displays the non-person episodes for the last 30 days in the Non-person Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.

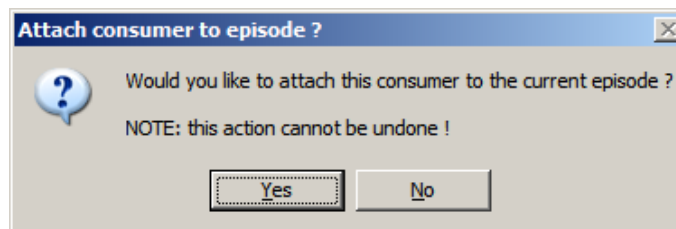
Non-person Episodes From 9/16/2007 to 10/16/2007						
1 of 17						
EpisodeID	EpisodeEndTime	CreatedByUserName	CreatedDate	ChangedByUserName	ChangedDate	
1352		qaoutreachmgr	5/13/2008 11:50 AM	qaoutreachmgr	5/13/2008 11:50 ...	
1351		qaoutreachmgr	5/13/2008 11:50 AM	qaoutreachmgr	5/13/2008 11:50 ...	
1350		qaoutreachmgr	5/13/2008 11:50 AM	qaoutreachmgr	5/13/2008 11:50 ...	
1349		qaoutreachmgr	5/13/2008 11:50 AM	qaoutreachmgr	5/13/2008 11:50 ...	
1348		qaoutreachmgr	5/13/2008 11:50 AM	qaoutreachmgr	5/13/2008 11:50 ...	

To attach a non-person episode to a consumer:

1. Double-click on the episode in the grid. The system displays the selected episode and removes any previous consumer information.
2. Use the search fields to display a consumer. If the consumer has an open episode, the following message appears:



If the consumer does not have an open episode, the following message appears:



3. Select **Yes** to merge the services or attach the consumer to the episode.

6.5. Viewing the Open Episodes on the System

You can view the open CRISIS [episodes](#) on the system by selecting **All Open** from the **View** menu. The system displays the open episodes for the last 30 days in the Open Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.

Open Episodes From 4/2/2008 to 5/2/2008

1 of 12

	EpisodeID	EpisodeEndDate Time	CreatedByUserName	CreatedDate	ChangedByUserName	ChangedDate
▶	1336		qacrisismanager	5/2/2008 9:36 AM	qacrisismanager	5/2/2008 9:36 AM
	1335		qacrisismanager	5/1/2008 2:01 PM	qacrisismanager	5/1/2008 2:01 PM
	1334		qacrisismanager	4/30/2008 4:23 ...	qacrisismanager	4/30/2008 4:23 ...
	1333		qacrisismanager	4/30/2008 4:13 ...	qacrisismanager	4/30/2008 4:13 ...
	1332		qacrisismanager	4/30/2008 4:13 ...	qacrisismanager	4/30/2008 4:13 ...

If you click on an episode record, the system displays the [service entry](#) information for that episode. If you double-click on an episode record, the system opens that episode and you can [add](#) or [change](#) service entry information.

6.6. Viewing the Closed Episodes on the System

You can view the closed CRISIS [episodes](#) on the system by selecting **All Closed** from the **View** menu. The system displays the closed episodes for the last 30 days in the Closed Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.

Closed Episodes From 4/2/2007 to 5/2/2008

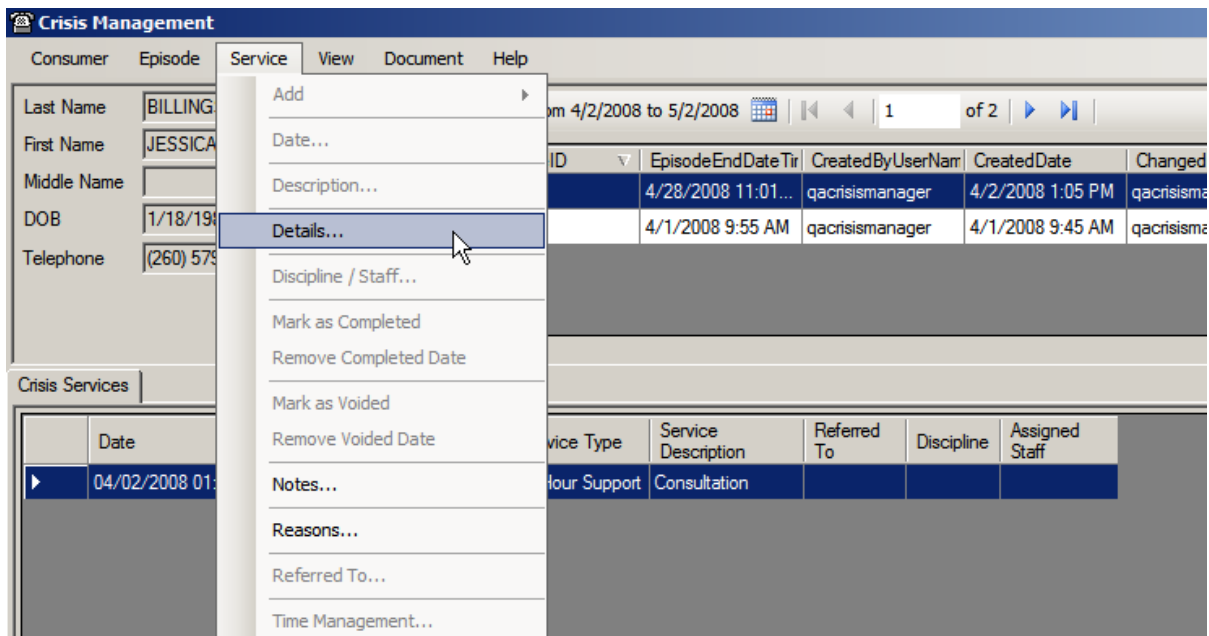
1 of 19

	EpisodeID	EpisodeEndTime	CreatedByUserName	CreatedDate	ChangedByUserName	ChangedDate
▶	1314	4/28/2008 11:01 AM	qacrisismanager	4/2/2008 1:05 PM	qacrisismanager	4/28/2008 11:01 AM
	1313	4/1/2008 9:55 AM	qacrisismanager	4/1/2008 9:45 AM	qacrisismanager	4/1/2008 9:55 AM
	1257	1/18/2008 10:33 AM	qacrisisdirector	1/18/2008 10:32 AM	qacrisisdirector	1/18/2008 10:38 AM
	1246	1/16/2008 10:41 AM	qacrisisdirector	1/16/2008 9:22 AM	qacrisisdirector	1/16/2008 10:41 AM
	1245	1/16/2008 9:07 AM	qacrisisdirector	1/16/2008 9:06 AM	qacrisisdirector	1/16/2008 9:07 AM

When you click on a closed episode record, the system displays the [service entries](#) for that episode and the following **Service** menu items become available:

- [Details](#)
- [Notes](#)
- [Reasons](#)

The following illustration shows an example of the **Service** menu for a closed episode:



6.7. Viewing Episodes as a Read-Only User

If you are assigned the [Read-Only](#) user role, the system displays both Outreach and Crisis episodes when you select **All Open** from the **View** menu. The following illustration shows an example of Outreach and Crisis episodes appearing together in the Open Episodes grid:

Open Episodes From 12/14/2008 to 1/13/2009

6 of 9

Episode Type	Status	End Date	Changed By	Changed Date	CustID
Outreach	Open		qaoutreachmgr	1/9/2009 10:48 AM	18441
Crisis	Open		qacrisisoperator	1/6/2009 8:27 AM	13919
Crisis	Open		qacrisismanager	1/5/2009 11:53 AM	18441
Crisis	Open		qacrisismanager	1/5/2009 11:48 AM	45100
Crisis	Open		qacrisidirector	1/5/2009 10:14 AM	7645

After you select an open episode for a consumer, you can view the service information on the open Crisis or Outreach episodes for the consumer, but you cannot change the data. When you select the **Service** menu or right-click on a service, the system displays a truncated menu that contains only the parameters that you can view, as shown in the following illustration:

CORM - Read Only

Consumer Service View Document Help

Last Name: [] Age: 55 Address: RR 3 [] SSN: []
 First Name: [] Gender: M City: ROCKVILLE Waiver: []
 Middle Name: [] State: IN Zip: 47872 Setting: []
 DOB: 8/3/1953 County: PARKE Status: INELIGIBLE
 Telephone: (765) [] RID: [] Eligible: ☐
 Custid: []

Episode List

Crisis Services Outreach Services DART Info

Date	Completed Date	Voided Date	Service Type	Service Description	Referred To	Discipline	Assigned Staff
01/05/2009 11:53 AM			24 Hour Support	Determination for Action		Behavior Clinician	Manager Test

Details...
Notes...
Reasons...

6.8. Changing the Date Range in an Episode Grid

You can change the date range for an episode grid by selecting the calendar icon in the navigation bar. The following fields appear when you select the calendar icon:

Use the **Enter Date Information** fields to change the start and end date. For example, if you cannot find the open episode you are looking for, you can move the start date of the date range to an earlier date to view different episodes.

Use the **Select A Date Range** fields to display episodes by 30-day groups (for example, 0 - 30 days, 30 - 60 days, etc) up to 120 days, selected from the drop-down list.

6.9. Viewing Previously Displayed Consumer Records

You can display a list of the consumers whose [episodes](#) you have accessed during the current CRISIS session (the session begins the moment you log into the CRISIS product).

To view previously displayed consumer records, select **Previous Consumer** from the **View** menu. The system displays the Consumers Found grid, similar to the following example:

Consumers Found: 9					
LastName	FirstName	MiddleName	DateOfBirth	HomePhone	Cust.Status
SMITH	AARON	MICHAEL	8/26/2002	7653452171	ELIGIBLE
STAFFORD	JASON	HOWARD	10/10/1938	7655551234	Referral
SMITH	ADAM		1/30/1969	3172660496	DO NOT USE
SMITH	ADRIANA	ROSE	12/8/1999	3178399933	ELIGIBLE
WILSON	ALEX		7/30/2000	8123975148	Waiting List - AAA

The Consumers Found grid shows the consumers you have displayed by using the [search fields](#) during the current CRISIS session. You can double-click a consumer record to redisplay the episode and [add](#) or [change](#) the [service entry](#) information.

6.10. Attaching (Uploading) a Document to an Episode

You can attach a document that is either too large for the [Service Notes](#) window or too general in nature for notes in a specific service, and must be attributed to the current open [episode](#) instead.

To save a document to an open episode, select **Upload (Save)** from the **Document** menu. The **File Upload Utility (Save)** window appears, as shown in the following illustration:

Important

The document you are uploading must be closed. If you attempt to upload a document that is open on your computer, an error message similar to the following example appears:

The following table describes the fields and buttons in the **File Upload Utility (Save)** window.

File Upload Utility (Save) Fields and Buttons

Field or Button	Description
File Name	<p>Use this field to enter the directory path to the document, if you know it. You can also use this field to copy and paste the location of the document.</p> <p>Important The file that you select MUST contain a file extension (for example, .DOC or .XLS). The system cannot upload a document that lacks a file extension.</p>

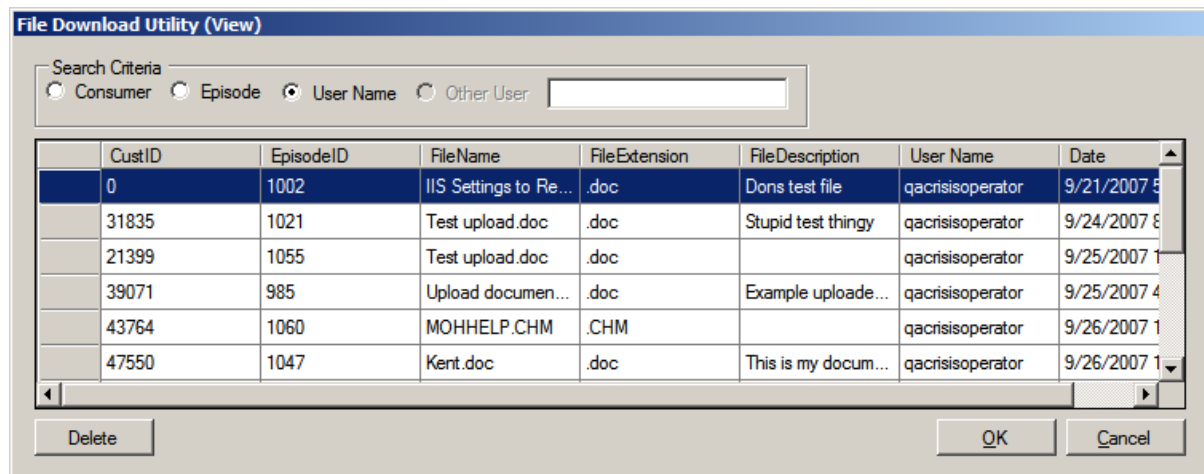
File Upload Utility (Save) Fields and Buttons (Continued)

Field or Button	Description
Description	Use this field to add a brief description to the document to make it easier to find later.
Browse	Select this button to manually browse for a document. Use the Open window that appears to locate and select the file to upload.
OK	<p>Select this button to complete the attachment of the document to the open episode and save the document to the DDRS database.</p> <p>Important</p> <p>You must enter a name in the File Name field and a description in the Description field to activate this button.</p>
Cancel	Select this button to cancel the upload process and close the File Upload Utility (Save) window.

6.11. Viewing (Downloading) a Document on an Episode

To download (view) a document from an [episode](#), select **Download (View)** from the **Document** menu.

The **File Download Utility (View)** window appears. A list of documents appears in the search grid on the window, as shown in the following illustration:



To download a document to view, you can double-click the document in the grid, or highlight the document and select **OK**.

When you download a document from the DDRS database, the system displays the document in the appropriate application (for example, a Word or Excel), providing that the application exists on the computer you are using to run the CRISIS product.

The following table describes the fields and buttons in the **File Download Utility (View)** window.

File Download Utility (View) Fields and Buttons

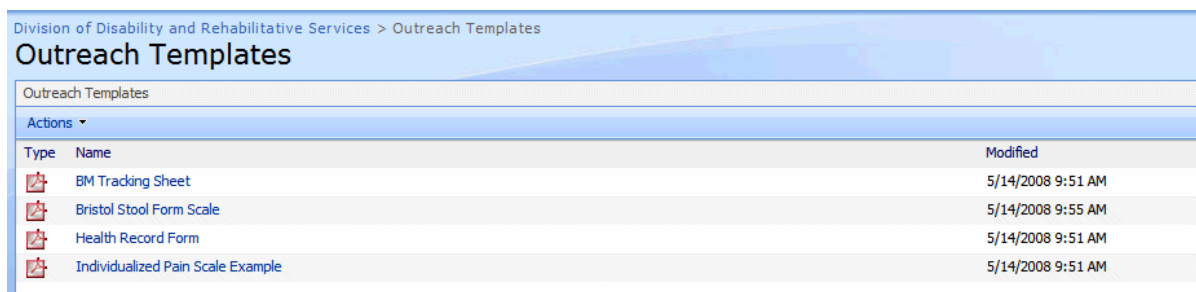
Field or Button	Description
Consumer	Select this radio button to display the documents attached to all closed or open episodes for the currently selected consumer.
Episode	Select this radio button to display the documents attached to the currently open episode.
User Name	Select this radio button to display the documents that only you have attached to consumers or episodes.

File Download Utility (View) Fields and Buttons (continued)

Field or Button	Description
Other User	Enter a user ID in the Other User field and then select this radio button to display the documents attached by that user. This radio button becomes selectable only after you have typed a user name in the Other User field.
Delete	(Manager function) Select this button to delete the selected document.
OK	Select this button to complete the download process and view the selected document. This button only appears after you select a document from the search grid in the File Download Utility (View) window.
Cancel	Select this button to cancel the download process and close the File Download Utility (View) window.

6.12. Accessing Outreach Templates

You can access PDF files for commonly used forms and documents (for example, the BM Tracking Sheet, Health Record form, and Individualized Pain Scale Example) by selecting **Templates** from the **Document** menu. The **Outreach Templates** page from the DDRS website appears, as shown in the following partial illustration:



The screenshot shows the 'Outreach Templates' page with a breadcrumb trail 'Division of Disability and Rehabilitative Services > Outreach Templates'. Below the title, there is an 'Actions' dropdown menu. A table lists four documents, each with a red icon, a name, and a modified date.

Type	Name	Modified
	BM Tracking Sheet	5/14/2008 9:51 AM
	Bristol Stool Form Scale	5/14/2008 9:55 AM
	Health Record Form	5/14/2008 9:51 AM
	Individualized Pain Scale Example	5/14/2008 9:51 AM

Select a document name to display the PDF for that file.

Important

You must have a PDF viewer loaded on your PC to view a PDF from this page. The Adobe Reader PDF viewer is a popular choice. Click [here](#) to display the procedure for installing the Adobe Reader on your computer.

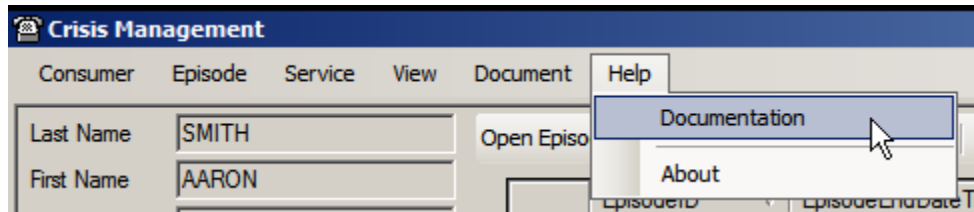
Because all of the documents on this page are read-only, you must print a hard copy of any forms and complete the form by hand.

7. The Help Menu

The **Help** menu contains items that you can use to:

- Access the CORM product documentation on the DDRS website.
- Display the version number and copyright information about the CORM product.

The following illustration shows an example of the **Help** menu:

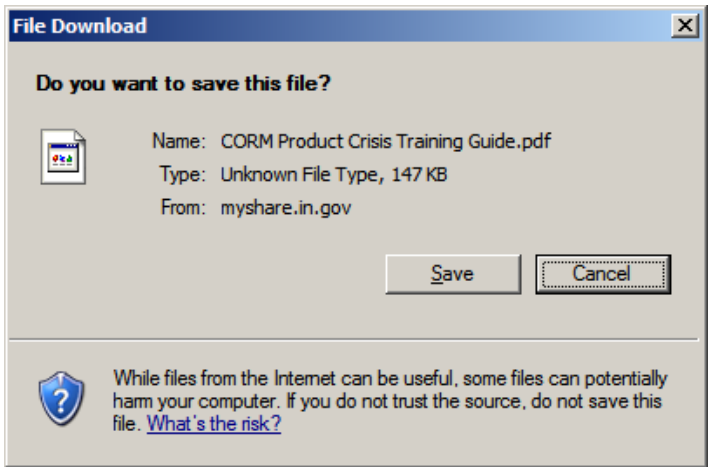



The following table describes the **Help** menu items.

Help Menu Items

Item	Description
Documentation	<p>Displays the CORM document library in the DDRS website. The CORM document library contains multiple PDF documents about the CORM product, including a PDF file for the most recent version of this user guide. The following illustration shows an example of the CORM document library:</p> <p>The screenshot shows the 'MyShare IN.gov' website for the 'Division of Disability and Rehabilitative Services'. The page title is 'CORM'. A sidebar on the left lists 'Documents' including 'Provider Tools', 'CORM', 'Event Schedule', 'First Steps', 'IFUR', '2008 Bulletins', '2007 Bulletins', '2002 - 2006 Bulletins', and 'Quarterly Bulletins'. The main content area shows a list of documents with a red icon next to each. A black oval highlights the following documents: '20071109 Release Notes', '20071211 Release Notes', 'CORM User Guide', 'Creating an Icon for the CORM System on Your Desktop', and 'Uninstall and Reinstall'.</p>

Help Menu Items (continued)

Item	Description
Documentation (continued)	<p>When you select a document title, the system displays the document in a separate window.</p> <p>Important If a window similar to the following example appears instead of the document, you do not have a PDF viewer loaded on your computer:</p>  <p>You must have a PDF viewer loaded on your PC. The Adobe Reader PDF viewer is a popular choice. Click here to display the procedure for installing the Adobe Reader on your computer.</p>
About	<p>Displays the following window, which shows the version number and copyright information for the CORM product:</p> 

Appendix A: Call Information Window Fields

The following illustration shows an example of the [Call Information](#) window:

The screenshot shows a window titled "Call Information" with two main sections: "Call Information" and "Referral Information".

Call Information Section:

- Phone Number: Text input field.
- Source Of Referral: Dropdown menu with "Advocate" selected.
- Location Of Person: Dropdown menu with "Home" selected.
- Immediate Danger: Section with radio buttons for "911 Called By" (Self, Guardian, Support Center).
- Agency Type: Dropdown menu with "Police" selected.
- Agency Name: Text input field.
- Agency Contact: Text input field.
- Contact Phone Number: Text input field.
- Who is in danger: Text input field.
- What is the danger: Text input field.
- Indications: Text input field.

Referral Information Section:

- Caller Last Name: Text input field.
- Caller First Name: Text input field.
- Company: Dropdown menu with "Behaviorist" selected.
- Address: Text input field.
- City: Text input field.
- State: Text input field with "IN" entered.
- Zip Code: Text input field.
- Contact Phone: Text input field.
- FAX: Text input field.
- Email: Text input field.
- Relationship: Dropdown menu with "Guardian" selected.

At the bottom right are "OK" and "Cancel" buttons.

The following table describes the fields in the **Call Information** section of the **Call Information** window.

Call Information Fields

Field	Description
Phone Number	<p>This field contains the phone number from where the person is calling.</p> <p>Enter the phone number for the location of the person who is calling in.</p>
Source of Referral	<p>This field contains the title of the person or organization that placed the phone call. Valid entries for this field include:</p> <ul style="list-style-type: none"> • Advocate • BDDS Service Coordinator/District Office • Behaviorist • BQIS • Case Manager • CMHC • Family

Call Information Fields (continued)

Field	Description
Source of Referral (continued)	<ul style="list-style-type: none"> • Guardian • Hospital • Individual • Inpatient • Interested Party • Jail • Local School Representative • Other • OUTREACH • Police
Location of Person	<p>This field contains the location of the person who needs Crisis assistance. Valid entries for this field include:</p> <ul style="list-style-type: none"> • Adult Day Services • Adult Foster Care • Caregiver Support Services • Child Foster Care • Community • Community Based Sheltered Employment Services • Community Habilitation and Participation: Community Based, Group • Community Habilitation and Participation: Community Based, Individual • Facility Based Sheltered Employment Services • Family Home • Group Habilitation Training • Home • Hospital • Jail • Mall • Nursing Facility • Other Large ICFMR • Park • PreVocational Services • Provider Home • Rehab Facility • Residential Habilitation and Support • Respite • Restaurant • SGL, Long Term/Short Term Residential • State Operated Facility • Treatment, Long Term/Short Term Residential • Work

The following table describes the fields in the **Immediate Danger** section of the **Call Information** window.

Immediate Danger Fields

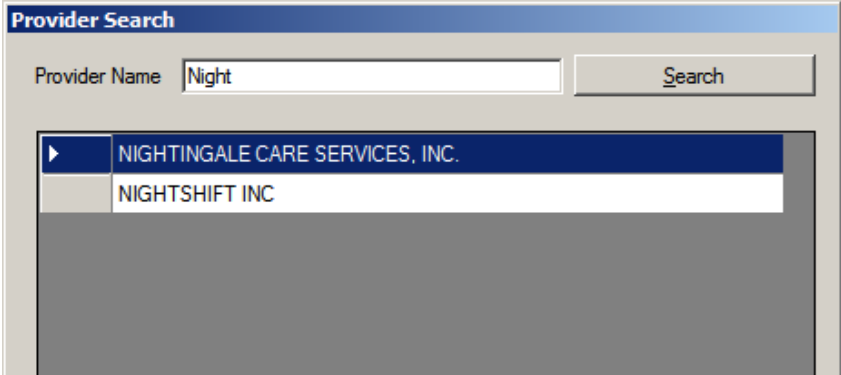
Field	Description
911 Called By	<p>If a call to 911 was placed, select the radio button that most accurately describes who placed the 911 call.</p> <p>Valid entries for this field are:</p> <ul style="list-style-type: none"> • Self • Guardian • Support Center
Agency Type	<p>This field contains the type of agency to which you referred the person in need of assistance.</p> <p>Select one of the following valid entries for agency type from the drop-down list:</p> <ul style="list-style-type: none"> • 211 Services • 911 Emergency • APS • CMHA • CPS • ER of Hospital • Outreach • Police • Referral to Agency • Risk Management • Training
Agency Name	<p>This field contains the name of the agency to which you referred the person in need of assistance.</p> <p>Enter the name of an agency.</p>
Agency Contact	<p>This field contains the name of the primary point of contact at the agency to which you referred the person in need of assistance.</p> <p>Enter the name of the primary contact.</p>
Contact Phone Number	<p>This field contains the phone number of the primary point of contact at the agency to which you referred the person in need of assistance.</p> <p>Enter the phone number for the primary contact.</p>

Immediate Danger Fields (continued)

Field	Description
Who is in danger	<p>This field contains the name of the person who is in danger or for whom the emergency call was placed.</p> <p>Enter the name of the person who is in danger.</p>
What is the danger	<p>This field contains the description of the situation that prompted the 911 emergency call.</p> <p>Describe the situation that prompted the emergency call.</p>
Indications	<p>This field contains the physical indications that the person in danger has exhibited.</p> <p>Enter the indications that the person in danger has exhibited.</p>

The following table describes the fields in the **Referral Information** section and the **Search Provider** button at the bottom of the **Call Information** window.

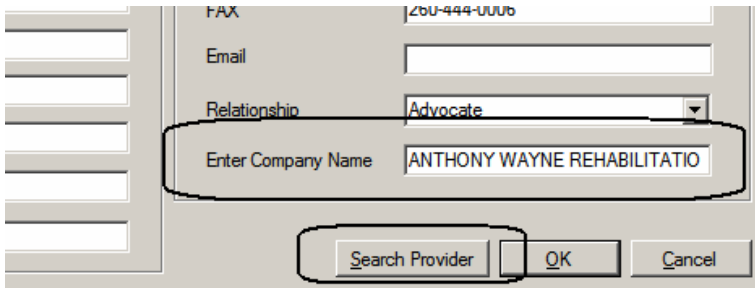
Referral Information Fields

Field or Button	Description
Caller Last Name	<p>This field contains the last name of the person who placed the call or referral.</p> <p>Enter the last name of the person who placed the call or referral.</p>
Caller First Name	<p>This field contains the first name of the person who placed the call or referral.</p> <p>Enter the first name of the person who placed the call or referral.</p>
Company	<p>This field contains the name of the company with whom the caller works.</p> <p>Select one of the following valid entries for the name of the company with whom the caller works from the drop-down list:</p> <ul style="list-style-type: none"> • BDDS • Behaviorist • Family • Other • Police Department • Provider • Psychiatrist • QMRP <p>When you select Provider, the Provider Search window appears so that you can search for an existing provider. Enter a provider name or portion of a provider name in the Provider Name field and select Search. The search results appear in the list box, as shown in the following partial illustration:</p> 

Referral Information Fields (continued)

Field or Button	Description
Company (continued)	<p>After you select a provider from the Provider Search window, the system automatically populates one or more of the following fields in the Referral Information section of the Call Information window:</p> <ul style="list-style-type: none"> • Address • City • State • Zip Code • Contact Phone • FAX • Email • Relationship • Enter Company Name
Address	<p>This field contains the street address of the location where the incident occurred.</p> <p>Enter the address of the location where the incident occurred.</p>
City	<p>This field contains the name of the city where the incident occurred.</p> <p>Enter the city for the address of the location where the incident occurred.</p>
State	<p>This field displays the state where the incident occurred, and is automatically generated according to the postal code that you enter into the Zip Code field.</p>
Zip Code	<p>This field contains the postal code for the address of the location where the incident occurred.</p> <p>Enter the postal code for the address of the location where the incident occurred.</p>
Contact Phone	<p>This field contains the phone number of the person who is acting as the primary contact for this referral.</p> <p>Enter the phone number of the primary contact for this referral.</p>
FAX	<p>This field contains the phone number to use to send a facsimile to the primary contact for this referral.</p> <p>Enter the fax number of the primary contact for this referral.</p>

Referral Information Fields (continued)

Field or Button	Description
Email	<p>This field contains the email address to use to converse electronically with the primary contact for this referral.</p> <p>Enter the email address of the primary contact for this referral.</p>
Relationship	<p>This field contains the relationship of the primary contact to the consumer.</p> <p>Select one of the following valid entries from the drop-down list:</p> <ul style="list-style-type: none"> • Advocate • Case Manager • Direct Care Staff • Family • Guardian • Provider
Enter Company Name and Search Provider button	<p>The system displays the Enter Company Name field and the Search Provider button when you select Provider from the Company field. The following partial illustration shows the location of these items:</p>  <p>You can manually enter a provider name in the Enter Company Name field or select Search Provider to perform a search in the Provider Search window.</p>

Appendix B: DART Information Screens

When you select the **DART Info** tab, DART information for the consumer appears, as shown in the following series of illustrations. The additional tabs at the bottom of the screen correlate to other screens in the DART product. The information is read-only. While you can select radio buttons, select or deselect check boxes, and add text to fields, the system does not save the changes.

DD Eligibility Tab

The following illustration shows an example of the contents of the **DD Eligibility** tab:

The screenshot displays the 'DD Eligibility' tab within the 'DART Info' section. The form is organized into several sections with checkboxes and text input fields.

- Eligible Conditions:** Includes checkboxes for 'Mental Impairment (not a mental illness)' (checked), 'Physical Impairment', and 'No Impairment Confirmed'.
- Age Of Onset:** Includes a checkbox for 'Reported condition originated AFTER age 22'.
- Duration:** Includes a checkbox for 'Reported condition IS NOT likely to continue indefinitely'.
- Care Treatment:** Includes a checkbox for 'Reported condition DOES NOT: reflect the individual's need for a combination and sequence of special, interdisciplinary or generic care treatment of other services that are of lifelong or extended duration and are individually planned and coordinated'.
- Substantial Limitations:** Includes checkboxes for 'Self Care', 'Learning', 'Self Direction', 'Capacity for Independent Living' (checked), 'Receptive and Expressive Language', 'Economic Self Sufficiency' (checked), and 'Mobility'.
- Eligibility Determination:** Includes a checkbox for 'Does meet eligibility criteria for Developmental Disabilities Services' (checked). Below this are two text input fields labeled 'Mental Impairment (Sources of Information)' and 'Physical Impairment (Sources of Information)'.

At the bottom of the screen, a series of tabs are visible: 'DD Eligibility' (selected), 'DDP Assessment', 'DDP', 'Incident', 'Personal', 'PCP Team', and 'Groups'.

DDP Assessment Tab

The following illustration shows an example of the contents of the **DDP Assessment** tab:

Crisis Services		Outreach Services		DART Info	
Preferred Language	English	<input type="checkbox"/> Does the individual have a history of seizures?		Frequency Of Seizures: 0	
Medication Support	Assistance				
Medical Conditions		Prescribed Medications		Behavior Frequency	
Respiratory	N	Antipsychotic	Not Currently	Has tantrums or emotional outbursts	Not this year
Cardiovascular	Y	Antianxiety	Not Currently	Damages own property or that of others	Not this year
Gastro-Intestinal	N	Antidepressant	Not Currently	Physically assaults others	Not this year
Genito-Urinary	N	Anticonvulsant	Not Currently	Disrupts activities of others	Not this year
Neoplastic Disease	N	Diabetes	Not Currently	Is verbally or gesturally abusive	Not this year
Neurological Diseases	N	Sedative/hypnotic	Not Currently	Is self-injurious	Not this year
		Other maintenance	Currently	Resists supervision	Not this year
Behavior Consequences		Runs or wanders away: Not this year			
Behavior problems currently prevent the individual from moving to a less restrictive setting?		N			
Has a written behavior intervention plan?		N			
Individual's environment must be carefully structured to avoid behavior problems		N			
Because of behavior problems, staff must sometimes intervene physically with individual (e.g., physically restrain individual or guide individual from room)		N			
Because of behavior problems, a supervised "time-out" period is needed at least once a week		N			
Because of behavior problems, the individual requires one-on-one supervision for many program activities		N			

DD Eligibility | DDP Assessment | DDP | Incident | Personal | PCP Team | Groups

DDP Tab

The following illustration shows an example of the contents of the **DDP** tab:

Crisis Services	Outreach Services	DART Info
Residential Status		
Living with 2 or less persons with MR/DD		
IQ 62		
Identified Disabilities		
Autism	N	
Cerebral Palsy	N	
Epilepsy/Seizure Disorder	N	
Mental Retardation	Y	
Hearing/Vision		
Hearing: (with hearing aid if used)	Normal	
Vision: (with best correction)	Moderate Imp	
Police involvement due to maladaptive behavior		
No		
Has the person been the alleged perpetrator of any of the follow crimes reported to a law enforcement agency, during the past year?		
Aggravated Assault	N	
Household Burglary	N	
Other	N	
Rape	N	

DD Eligibility	DDP Assessment	DDP	Incident	Personal	PCP Team	Groups
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Incident Tab

The following illustration shows an example of the contents of the **Incident** tab:

Crisis Services | Outreach Services | DART Info

Total Incidents: 12

Incident #	Date	Time	Location of Incident	Oversight Provider	Action
144863	Thursday, April 12, 2007	4:00 PM	HOSPITAL	WABASH CENTER, INC.	4/13/07 BQIS NOTE - MARY SWINFORD: See IR 144845 regarding reasons for the injury. IR 144845...
144480	Friday, April 06, 2007	1:30 PM	WORKSHOP	WABASH CENTER, INC.	IR Scott was exiting the workshop and stopped for a moment. Stephanie Stopfer (habilitation specialist) continued to walk by him pushing a...
143845	Sunday, April 01, 2007	9:30 PM	HOME, OWN	WABASH CENTER, INC.	4/13/07 BQIS NOTE - MARY SWINFORD: See IR 144863 regarding staple removal. IR 144863...
143682	Saturday, March 31, 2007	8:30 PM	HOME, OWN	WABASH CENTER, INC.	IR Scotty was in the bathroom and started banging his head on the wall. Staff came in and put on Scotty's helmet as per his behavior plan...
138246	Sunday, February 04, 2007	7:30 PM	HOME, OWN	WABASH CENTER, INC.	IR At approximately 7:30pm, staff member, Jessica Releford, notified site manager, Tabitha Smith, that she believed other staff member, To...
137189	Monday, January 22, 2007	7:15 PM	HOME, OWN	WABASH CENTER, INC.	IR Scottie was doing his laundry. He headed back towards his bedroom. Before staff knew anything, he started banging his head on the w...
135522	Friday, January 05, 2007	10:00 PM	HOME, OWN	WABASH CENTER, INC.	IR Scottie was eating chips and spilled them on the floor. Scottie started to pick them up and became frustrated because he couldn't get t...
133791	Friday, December 22, 2006	9:00 AM	HOSPITAL	WABASH CENTER, INC.	IR Scotty was taken to the ER room for a follow-up visit to have staples removed from his head from the incident on 12/13/2006. Dr. said...
133103	Saturday, December 16, 2006	10:30 PM	HOME, OWN	WABASH CENTER, INC.	IR Scott was not feeling well and became agitated. He was redirected as per his behavior plan. As he was walking down the hallway to go...
133031	Wednesday, December 13, 2006	10:30 PM	HOME, OWN	WABASH CENTER, INC.	12-22-06 BQIS note Tammy Tungett Incident closed due to filing of incident report for ER visit to have staples removed. IR Scotty...
130935	Monday, November 20, 2006	7:00 AM	HOME, OWN	WABASH CENTER, INC.	IR Scott did not want to get up. When he did get up he was agitated and hit the wall, damaging the wall. Scott was redirected as per his b...
127853	Monday, October 16, 2006	3:15 PM	WORKSHOP	WABASH CENTER, INC.	IR DS had stolen and Stephanie Stopfer (habilitation specialist) verbally prompted him to return the item. DS turned around and slapped Sc...

4/13/07 BQIS NOTE - MARY SWINFORD: See IR 144863 regarding staple removal.

Scott was having behaviors. Staff tried to redirect as per his behavior plan. Staff tried to put Scott's helmet on. Before they could do so, Scott banged his head on the wall and received a gash. Scott's manager was called and Scott was taken to the ER. The ER doctor put staples in Scott's head. Scott was released to go home and no further incidents occurred.

PLAN TO RESOLVE
Staff will continue to monitor Scott for signs of self-injurious behaviors. Staff will attempt to put Scott's helmet on when he starts having behaviors. Staff will continue to follow Scott's behavior plan and implement as written.

More

DD Eligibility | DDP Assessment | DDP | Incident | Personal | PCP Team | Groups

Personal Tab

The following illustration shows an example of the contents of the **Personal** tab:

Chais Services | Outreach Services | DART Info

BDDS Service Coordinator:

BDDS District:

Guardian Information

Name:
 Address:
 City: Zip:
 State: Relationship:
 Phone:

Case Notes

Date	Author	Note
8/8/2006		Follow-up to 7/23/06 incident (120477) from Carey Services was received on 8/8/06.
6/8/2006		Follow up for 5/4/06 incident shows that Judy has no new AWOL's and behavior plan is being followed. Incident should be closed.
4/6/2006		Incident report dated 4/3/06 at 4:00 PM from Carey Services was received on 4/6/06.
6/14/2005		Follow-up to 4/15/05 incident from Carey Services (81440) was received on 6/14/05.
7/29/2004		Incident report dated 7/23/04 from Carey was received on 7/29/04.

Follow-up to 7/23/06 incident (120477) from Carey Services was received on 8/8/06.

DD Eligibility | DDP Assessment | DDP | Incident | **Personal** | PCP Team | Groups

PCP Team Tab

The following illustration shows an example of the contents of the **PCP Team** tab:

Crisis Services | Outreach Services | DART Info

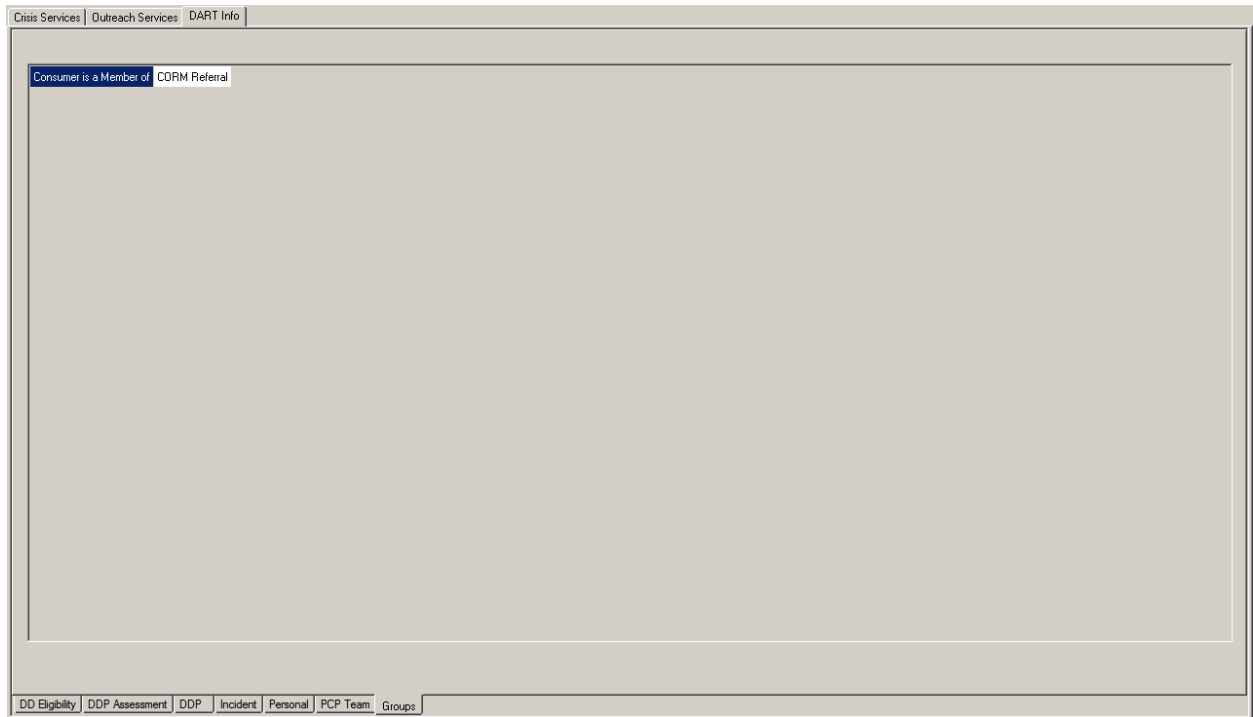
Person Centered Planning

Provider Type	Provider Name	Contact	Phone
▶ Case Manager	INDIANA PROFESSIONAL MANAGEMENT GROUP	MC GEE-VINZANT, CLARA	2198796142
Residential	NORTHERN INDIANA SUPPORTED LIVING PROGRAM	MARGIE CANTEY	260-744-6145

DD Eligibility | DDP Assessment | DDP | Incident | Personal | PCP Team | Groups

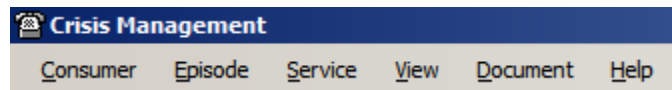
Group Tab

The following illustration shows an example of the contents of the **Group** tab:

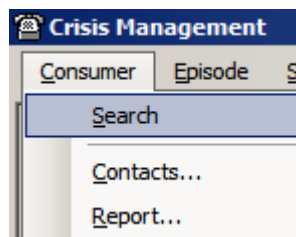


Appendix C: Using Hot Keys

The CRISIS product uses hot keys for the menus on the menu bar. A hot key is a combination of keys that you press to display and select menus and menu items. Each hot key works in conjunction with the **Alt** key and is identified by an underlined letter in the menu name, as shown in the following illustration:



For example, the letter **C** on the **C**onsumer menu indicates that if you press and hold the **Alt** key and then tap (press and release) the **c** key, the **C**onsumer menu will expand, as shown in the following illustration:

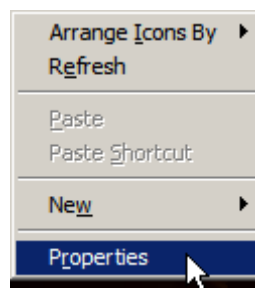


Tip

If the menu names on your CRISIS screen do not contain underlined letters, press the **Alt** key to display the underlines under the hot key letters.

To permanently display the underline on hot key letters, use the following steps:

1. Minimize the windows on your screen to display the Windows Desktop.
2. Point to a blank area of the Desktop and right-click.
3. Select **Properties** from the short cut menu that appears, as shown in the following illustration:



4. Select the **Appearance** tab in the **Display Properties** window that appears.
5. Select the **Effects** button near the bottom of the **Appearance** tab.

6. Uncheck the **Hide underlined letters for keyboard navigation until I press the Alt key** check box in the **Effects** window.
 7. Select **OK** in the **Effect** window.
 8. Select **Apply** and then **OK** in the **Display Properties** window.
-

After you display a menu, you can either select one of the items from the menu by pressing the corresponding hot key, or you can press the **Left Arrow** or **Right Arrow** key to expand a different menu.